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Education, Training and Development Practices Sector Education and Training Authority

BID NO: SCMU NO: 08 - 2025/26

PROJECT DESCRIPTION:

**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT
A TRACING AND TRACKING STUDY FOR THE ETDPSETA SKILLS DEVELOPMENT
PROGRAMS BENEFICIARIES**

1. INTRODUCTION

The Education Training and Development Practices Sector Education and Training Authority (ETDP SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act, No. 97 of 1998. Its mandate is to advance skills levels in line with the National Skills Development Plan. The ETDP SETA promotes and facilitates the development and improvement of the skills profile of the sector's workforce to benefit employers, workers, and employees in the ETD sector.

The ETDP SETA will host a **COMPULSORY virtual briefing session** for **BID NO: SCMU: 08 - 2025/26 – APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A TRACING AND TRACKING STUDY FOR THE ETDPSETA SKILLS DEVELOPMENT PROGRAMS BENEFICIARIES** on **25 September 2025 at 11h00**. Access details will be available on www.etdpseta.org.za as of **23 September 2025**. The meeting will close for outsiders at **11h20**.

Interested service providers may submit their questions until **12h00 on 26 September 2025**. No further questions will be accepted after this date. We thank you for your cooperation.

The ETDP SETA reserves the right not to award the BID.

2. PURPOSE & OBJECTIVES

2.1. BACKGROUND, PURPOSE OF THE PROJECT AND PROJECT REQUIREMENTS

During the period 2020/21 to date, the ETDP SETA has implemented several skills development interventions, as indicated in the table below. These interventions aim to equip beneficiaries with relevant skills to achieve competence in occupationally directed programmes at both intermediate and high levels. Importantly, they also provide beneficiaries with workplace experience to enhance their prospects for future employment.



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The table below presents the breakdown of the estimated number of beneficiaries who enrolled in and completed these interventions during the respective years.

intervention	2020/21		2021/22		2022/23		2023/24		2024/25	
	Enrolled	Completed	Enrolled	Completed	Enrolled	Completed	Enrolled	Completed	Enrolled	Completed
Internships	3034	4769	865	1343	1505	591	967	495	1165	952
Learnerships	0	1642	0	873	200	0	503	0	500	129
WIL for TVETs	354	1369	509	223	1301	356	1308	1036	1506	1097
WIL for UoTs	63	0	0	0	635	0	755	702	1332	1348
Bursaries	605	107	1258	233	3033	291	1983	122	1558	714
Skills programmes	4169	12114	2428	6639	3898	9418	3959	3300	3704	4388

The study seeks to explore the trends, challenges, and outcomes of the various skills development interventions implemented in the ETDP sector between the **2020/21 and 2024/25 financial years**. The findings will contribute to the development of sustainable skills development interventions for the ETDP SETA, which will positively impact the sector and promote inclusive economic growth in the country.

The assignment will provide the ETDP SETA with critical information regarding the **destinations of learners** who have entered and completed these interventions.

Tracking and tracing studies are designed to determine whether an intervention is achieving its objectives and to demonstrate the extent to which the intended outcomes are being realised. The study should therefore include the following aspects:

- Employment status** (employed, self-employed, or unemployed).
- Employment rates**.
- Nature of employment**, including sector or type of employment (formal or informal), tenure (part-time, full-time, contract, or permanent), salary level, and benefits (UIF, pension, medical aid, allowances).
- Further study** opportunities pursued by beneficiaries.

2.2 Objective of the study

The study should therefore address the following related objectives:

- a) To document changes in the lives of the former beneficiaries of ETDP SETA skills development interventions.
- b) To understand if and how each of the interventions contributed to these observed changes.
- c) To learn how the interventions could have been designed differently in order to enhance impact and eventually use the knowledge to improve decision making and the design of future interventions.

2.3 Specific Research Questions

The study seeks to answer the following specific questions:

1. What are destinations of students who participated in the interventions?
 - a) Are they employed?
 - b) Are they not working?
 - c) Are they studying further?
2. If employed:
 - a) Where are they employed (name of the company/ or organization)?
 - b) What is their occupation?
 - c) Has there been a change in jobs since completing the learning programme?
 - d) After the program has there been a difference in rank/ post level?
 - e) Are they employed full-time or part time and temporary or contract?
 - f) What are their wages?
 - g) What benefits and allowances are they getting?
3. If not in employment, why?
 - a) Are they studying full-time?
 - b) Are they looking for employment?
 - c) Are they ill?
 - d) Are they looking after parents, siblings?

3. PROJECT SCOPE AND DELIVERABLES

3.1 Project Scope

- 3.1.1 The service provider will be required to track and trace the learners who entered and completed the interventions as indicated in the table above.
- 3.1.2 Activities include:
 - a) Develop appropriate questionnaires.
 - b) Conduct telephonic interviews based on an online questionnaire with a specified sample of learners who have entered and completed the interventions. A comprehensive database of the population of learners enrolled and completed will be provided by the ETDP SETA.
 - c) Report on the profile of the beneficiaries which will include *inter alia*:

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Details with respect to the characteristics of the learners including:

- demographics, qualifications, occupational profiles
 - Learner absorption rates into the labour market
 - Employment status (employed or unemployed)
 - Self-employed vs. employees
 - Employment sector (formal or informal sector)
 - Tenure (part time or full time, contract or permanent)
- d) Interview a minimum of twenty employer mentors of the beneficiaries.
- e) Deliver a database of interviewees and online questionnaires.
- f) Produce a track and trace technical report based on a template approved by the ETDP SETA

3.2 Methodology and Approach

- a) The selected sample size must consist of 100% of population. The contracted service provider will be paid based on evidence contactable learners which should not be less than 20% of the population size.
- b) The service provider is expected to follow appropriate sampling guidelines.
- c) Register interview data in excel format.
- d) Deliver a report against each of the intervention based on a template provided by the SETA.

3.3 Ethics and Tracer Studies Statement

Ethics are defined as “a set of moral principles and rules of conduct” and are “concerned with respecting research participants throughout each project”. Ethical considerations are paramount in any study involving living subjects. They must be even more prominent in a research agenda involving children and youth.

This study must strive to find ways to carry out research with participants that provides valid, good quality information while at the same time protecting them from processes that fail to respect their ideas, and integrity, exploit them or intrude into their privacy. Prospective service providers are required to put special measures in place in terms of participation, respect for cultural traditions and customs of research participants.

3.4 Proposal Requirements

The prospective service provider must submit proposal that entails the following:

- a) Description of the interventions to be evaluated, the ToRs and the socio-economic context within which the interventions are implemented.
- b) Articulation of an evaluation approach, design and methodology for the study including literature and documentation review research strategy, design, procedures/methods, data collection, storage, processing and analysis procedures, tools, sampling, suggestions for elaboration or changes to scope & methodology as outlined in the ToRs and examples of examples of evaluation questions etc.
- c) Activity based evaluation plan with clear timelines and responsibilities.
- d) Activity based budget in South African rand; including vat as per the costing model indicated below.
- e) Proof of competence in a form of qualifications, experience and a list of related projects undertaken in the past with contact people with contact details as references.

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- f) Evaluation team structure: outlining clear roles and responsibilities.
- g) Capacity development elements.
- h) Quality assurance plan that will ensure that the process and the product will be of excellent quality.
- i) Project management measures and structures.
- j) Risks and mitigation measures.
- k) CVs and qualifications of all team members.

3.5 Project milestones and Payment Schedule

The bidder must outline the milestones/deliverables and payment schedules in their proposal.

3.6 Bid Offer

The bid proposal should clearly indicate the total price in South Africa rand, inclusive of VAT. The payment of the appointed service provider will be according to the proposed payment schedule and will be based on the actual quoted price.

3.7 Requirements for Personnel

The key evaluation team should comprise:

Role	Qualification	Experience
Project manager	Post-graduate, preferably a master's degree	at least 5 years' relevant experience in project management and at 3 years in evaluations
Evaluation specialist	Post-graduate, preferably a master's degree	at least 3 years' experience in evaluations,
Sector specialist	Postgraduate, preferably an honour' degree or equivalent NQF L8	at least 3 years' experience in skills development within the education, training, and development sector.
2 x interns	Postgraduate qualification preferably an honours or equivalent at NQF level 8 or master's degree	None

The project team should possess the following core competencies

- Contextual knowledge and understanding
- People skills
- Project management skills
- Knowledge of the evaluation discipline and practice
- Knowledge of research practice
- Report writing and communication skills

NB: The two (2) interns will be contracted by the service provider for the duration of the contract 12 months. CVs and certified qualifications of the key team members must be attached.

4. DURATION OF THE AGREEMENT

The successful service provider will be required to enter a formal contract with the ETDP SETA by signing a Service Level Agreement (SLA). The contract will become effective on the date of last signature and will be initiated through a commencement meeting between the two parties. The contract period shall not exceed **12 months** from the date of project commencement.

5. COSTING MODEL (PRICING SCHEDULE)

THIS COSTING MODEL MUST NOT BE MODIFIED AT ALL AND IF RETYPED ALL LINE ITEMS IN ORDER AS STATED BELOW TO BE INCLUDED

NB: The service provider must submit an itemised budget proposal, clearly indicating the cost per unit. The budget should include a R7 500 monthly stipends for the two interns for the duration of the project (12 months).

COSTING REQUIREMENTS			
NAME OF BIDDING ORGANISATION:			
ITEM DESCRIPTION	UNIT COST	AMOUNT	COMMENTS
Labour costs inclusive of the two (2) interns appointed for the duration of the contract			
Project management and overheads (25%)			
Total project budget			
Detailed activity-based labour budget e.g.			
Inception and scoping Meeting			
Monthly meetings and working sessions			
Document analysis and literature review			
Inception report writing			
Sampling strategy and instrument design			
Data collection and analysis			
Interpretation of the results			
Quality assurance and risk mitigation			
Report writing			
Presentation of study results			
Other			
TOTAL LABOUR COSTS			
VAT @15%			
TOTAL COSTS			
ALL COSTS MUST BE INCLUSIVE OF VAT			

All pricing shall be in South African Rand (ZAR). All project milestone with costing should be listed on the pricing schedule.

NAME OF BIDDER: _____

POSITION/ ROLE: _____

SIGNATURE: _____

6. METHOD OF SUBMISSION

Bidders must submit bid proposal in either USB stick or physical document in a clearly marked envelope with bidder's details and bid reference number. **Documents for Stage 1 (Administrative requirements and Stage 3: Phase B: Pricing) must be submitted in physical form/documents.**

There must be three folders in the USB cover the following stages.

Folder A: Stage 1: Administrative Requirements **(physical documents)**

Folder B: Stage 2: Phase A: Functionality Evaluation Requirements

Phase B: Price and Specific Goals **(physical documents)**

It is the responsibility of the bidder to ensure that all relevant documents are included in the USB to ensure efficient evaluation of its proposal. ETDP SETA will not take any responsibility for any missing information in the tender submissions.

7. EVALUATION CRITERIA

The evaluation criteria for the assessment of the proposals will be based on both qualitative and financial aspects of the proposal. Service Providers will be evaluated on functionality. The bidders that score points which equal to or exceed the minimum threshold provided on functionality will further be evaluated on price and specific goals.

The Bid documents will be evaluated individually on a score sheet, by a representative of the evaluation panel according to the evaluation criteria indicated in the Terms of Reference.

THE ETDP SETA applies the provisions of the Preferential Procurement Policy Framework Act, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2022. The evaluation will be guided by ETDP SETA SCM policy.

7.1 STAGE 1: Administrative Compliance

Bidders will be evaluated on the submission of the requested administrative documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked. Where bidders have failed to adhere to the administrative requirements, they will be afforded two working days to rectify, failure to adhere to the given timelines will lead to automatic disqualification.

Description	Comply/Submitted
Completion in full the Request for Proposal document	
Completion of all SBD Forms (SBD 1, SBD 4 and SBD 6.1)	
Signed General Conditions of Contract	
Registration with Central Supplier Database (CSD) – provide CSD number or report	
Proof of company registration documents (e.g., Pty; Trust; CC etc.)	
Original or certified copy of B-BBEE Level of contribution Certificate OR A sworn affidavit –B-BBEE Exempted Micro Enterprise (Failure to attach certificate will lead to non- allocation of points)	
Submit a <i>“Unique security personal identification number (PIN) issued by SARS” which the SETA will use to verify the bidder’s tax matters prior to the award</i>	

7.2 STAGE 2: FUNCTIONALITY

The evaluation of this bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid documents.

The functionality evaluation has two phases:

Phase A: Functionality evaluation: Document evaluation

All bidders who score less than **90 out of 100 points** for functionality will not be considered further. Bidders who meet minimum score will be evaluated further on price and specific goal in accordance with the 80/20 preference point system prescribed in the Preferential Procurement Regulations, 2022 and the ETDP SCM Policy. Bidders who fail to score the minimum score will be disqualified from further evaluation.

Functional Evaluation Criteria

NO	EVALUATION CRITERIA	Method of evaluation	POINTS
1.	<p>Organisational Experience & Expertise: (24 Points)</p> <p>Proof of project management and evaluations experience with contactable references attached.</p> <p>* Each reference letter must clearly indicate:</p> <ul style="list-style-type: none"> - <i>Be on the client's letterhead,</i> - <i>Name of the project,</i> - <i>Nature of similar service rendered,</i> - <i>Confirm the status of project (s) [Current or Completed],</i> - <i>Have recommendations and contact details, and</i> - <i>Be signed.</i> <p><i>NB: Reference letters (within 10yrs) must be on a <u>company letter head</u>, <u>signed and dated</u>, otherwise they cannot be considered.</i></p> <p>1.1. Execution of similar projects: Contactable references (for projects within past 10yrs): 12 Points</p>	<ul style="list-style-type: none"> • Three (03) or more reference letters 	12

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	1.2. Number of Years' Experience in project management and conducting evaluations: (12 Points)	<ul style="list-style-type: none"> Two (02) reference 7 One (01) reference letter 3 No reference letter 0 Five (05) years or more 12 Three (03) – Four (04) years 7 One (01) – Two (2) years 3 Less than one (01) year 0 	
2.	Capacity of the project team and experience: 2.1 Project manager who has 5yrs project management experience and 3yrs evaluation experience (4.5) 2.2. Qualifications of a Project Manager. (4.5) <ul style="list-style-type: none"> Master's Degree or equivalent = 4.5 points Honour's Degree/equivalent at NQF Level 8 or equivalent 2.3 Experience of Evaluation Specialist in conducting similar projects. (4.5) 2.4 Qualifications of an Evaluation Specialist. (4.5)	<ul style="list-style-type: none"> 5yrs project management & 3yrs evaluations or more 4.5 Three (3) – Four (4) years 3 One (1) – Two (2) years 2 Less than one (01) year 0 Master's Degree or equivalent 4.5 Honour's Degree/equivalent at NQF Level 8 or equivalent 3 Three (3) years or more 4.5 Two (2) years 3 One (1) year 2 Less than one (1) year 0 Master's Degree or equivalent 4.5 Honour's Degree or Equivalent NQF L8 3 	

	2.5 Experience of Sector Specialist in skills development in the ETD sector. (4.5)	<ul style="list-style-type: none"> • Three (3) years or more • Above (2) to 3 years • Above (1) to 2 years • Less than one (1) year 	4.5 3 2 0
	2.6 Qualifications of a Sector Specialist. (4.5)	<ul style="list-style-type: none"> • Honours Degree or equivalent NQF L8 • Batchelor's Degree or equivalent 	4.5 3
	2.7 Qualifications of two (2) Research Interns. (9)	<ul style="list-style-type: none"> • Both Master' Degree or equivalent • Both Honours Degree or equivalent NQF L8 or mix of both qualifications 	9 6
	*Note: No changes should be made to the team without prior consultation with the ETDP SETA.		
3	Technical proposal of the project: (40 points)		
	3.1 Understanding the task and responsiveness to the ToRs	<ul style="list-style-type: none"> • Bidder shows understanding and responsiveness of the ToR • Bidder lacks understanding of ToR 	7 0
	3.2 Demonstration of broader understanding of the ETD within context of the study	<ul style="list-style-type: none"> • Bidder demonstrates broader understanding of ETD withing context of study • Bidder did not demonstrate understanding of ETD withing context of study 	5 0

	<p>3.3 Research methodology: full description of the study design (including project plan data collection and data analysis approach.</p>	<ul style="list-style-type: none"> Bidder provider full description of study design 	6
		<ul style="list-style-type: none"> Bidder did not provide any description of study design 	0
	<p>3.4 Indication of resources allocation</p>	<ul style="list-style-type: none"> Bidders provide/indicated resources allocation 	5
		<ul style="list-style-type: none"> Bidder did not provider/indicate resource allocation. 	0
	<p>3.5 Deliverables with realistic milestones and timeframes.</p>	<ul style="list-style-type: none"> Bidder provider a proposal indicating deliverables with realistic milestones and timeframes (within 6 months) 	7
		<ul style="list-style-type: none"> Proposal does not have deliverable with realistic timeframes (outside 6 months) 	0
	<p>3.6 Risks and mitigation strategies</p>	<ul style="list-style-type: none"> Proposal included risk and mitigation strategies 	5
		<ul style="list-style-type: none"> No risk and mitigation strategies 	0
	<p>3.7 Capacity development plan for interns</p>	<ul style="list-style-type: none"> Bidder providers a capacity development plan 	5

		<ul style="list-style-type: none"> No capacity development plan 	0
TOTAL			100

Bidders must provide documents to justify awarding the above points, and such include details of contactable references to validate the information submitted.

7.3 STAGE 3: Price and Specific Goals [Folder C (USB)]

80/20 preference point system shall be applicable as follows:

Price

Allocation of specific goals

80 ----- points for pricing

20 ----- points for specific goals

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP-SETA will adhere to its policy on the appointment of service providers.

8. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserves the right to negotiate the bidder's price.
3. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned or submitted by facsimile will NOT be accepted.
5. Bidders with a turnover above R 10 million must submit a valid certified B-BBEE Verification Certificate from SANAS Accredited Verification Agency in order to be used to verify eligibility for allocation of points for specific goals.
6. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less to be used to verify eligibility for allocation of points for specific goals.

7. A Qualifying Small Enterprise (QSE) is required to submit a sworn affidavit confirming their annual total revenue of between R 10 million and R 50 million and level of black ownership or a B-BBEE level verification certificate to be used to verify eligibility for allocation of points for specific goals.
8. Companies who bid as a joint venture must submit a consolidated B-BBEE Verification certificate prepared for this bid only, from SANAS Accredited Verification Agency in order to be used to verify eligibility for allocation of points for specific goals. Companies who form part of this joint venture MUST have an accreditation certificate with relevant authority as stated in Mandatory documents.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that no points will be allocated for specific goals.
10. Bids submitted are to hold good for a period of 90 days.
11. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
12. All suppliers must be registered on the Central Supplier Database. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier.
13. Companies that are in the process of de-registration in the CIPC will not be considered.
14. The ETDP-SETA remains the sole owner and custodian of all content, material, or any other form of development. No information of or on behalf of the ETDP-SETA may be shared, during the duration or after the closing period of the project. It remains the responsibility of the appointed service provider to hand over all material to the ETDP-SETA. Should a service provider wish to have the ETDP-SETA as a referral, permission for this must be sought.

9. DISCLAIMER

Protection of Personal Information Act 4 of 2013 (POPIA) and Promotion of Access to Information Act 2 of 2000 (PAIA) Disclaimer

1. By submitting your proposal, you grant the necessary consent as you acknowledge that:
 - ETDP SETA treats data it gathers and personal information it collects, holds and/or processes as private.

The information in this communication is confidential and may be legally privileged. It is intended for the sole use of the individual/s or entity to whom this has been addressed or copied. If you are not the intended recipient you are hereby notified that any disclosure, copying, distribution or taking action in reliance of the contents of this communication and/or its attachments, is strictly prohibited and will be unlawful

2. Therefore:

- Your right to privacy and security is very important to us. The ETDP SETA as a responsible party treats personal information of data subjects as private and confidential. To that end, we collect personal information for the purposes set out in this document or otherwise the specific purpose(s) communicated to you.
-

3. We may also use your information for a number of different purposes, for example to fulfil our legal and regulatory obligations.

For more detailed information on how and why we may use your information, including the rights in relation to your personal data, and our legal grounds for collection, processing and using it, please view the ETDP SETA Protection of Personal Information Policy and Promotion of Access to Information Manual on our website: www.etdpseta.org.za ETDP SETA PAIA Manual and POPIA Manual.

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00am** on **Monday, 06 October 2025.**

11. BID DOCUMENTS / PROPOSAL PACKS

Bid documents must be downloaded from the ETDP SETA website at www.etdpseta.org.za under:

Main Menu > Supply Chain Management > Open Tenders from 12h00 on 12 September 2025. Bidders are required to submit **technical and financial proposals** on one (1) USB, clearly marked as follows:

- **Folder A – Technical Proposal**
- **Folder B – Financial Proposal**
Folder B (Financial Proposal) must include the following:
 - A completed **Costing Model** (price must be final, inclusive of VAT, and signed).
 - A **unique security personal identification number (PIN)** issued by SARS, which the ETDP SETA will use to verify the bidder's tax compliance.
 - **Invitation to Bid (SBD 1).**
 - **Declaration of Interest (SBD 4 – New).**
 - **Preferential Points Claim Form (SBD 6.1)** in terms of the Preferential Procurement Regulations, 2022 (if claiming preferential points). This will be used to verify points allocated for specific goals.
 - **B-BBEE Certificate or Sworn Affidavit** (if claiming preferential points). This will also be used to verify points allocated for specific goals.

Please note: The **Financial Proposal (Folder B)** will only be opened if the tender is found to be responsive in **Stage 2, or at the discretion of the ETDP SETA.**

All Bids/Proposals **(completed in [one (1) USB])** must be **courier or hand delivered to:**

**The ETDP SETA – Head Office
Hoskens House
45 Mooi Street
Johannesburg
2091**

No late submission will be accepted!

12. CONTACT PERSON

No telephonic or any other form of communication relating to this bid will be permitted with any ETDP SETA staff member, whether by bidders (as a collective bidding team or individual member), representatives of bidders, associates of bidders, or shareholders of bidders, other than with the named individual stated below.

Any attempt to influence the adjudication process or its outcomes will result in the immediate disqualification of the entire bid.

All enquiries regarding this bid must be submitted in writing only and directed to:

Supply Chain Management

Email: Tenderers@etdpseta.org.za

Note: Companies that are blacklisted on the National Treasury database and prohibited from conducting business with public entities will be disqualified.