



REQUEST FOR PROPOSAL (RFP)

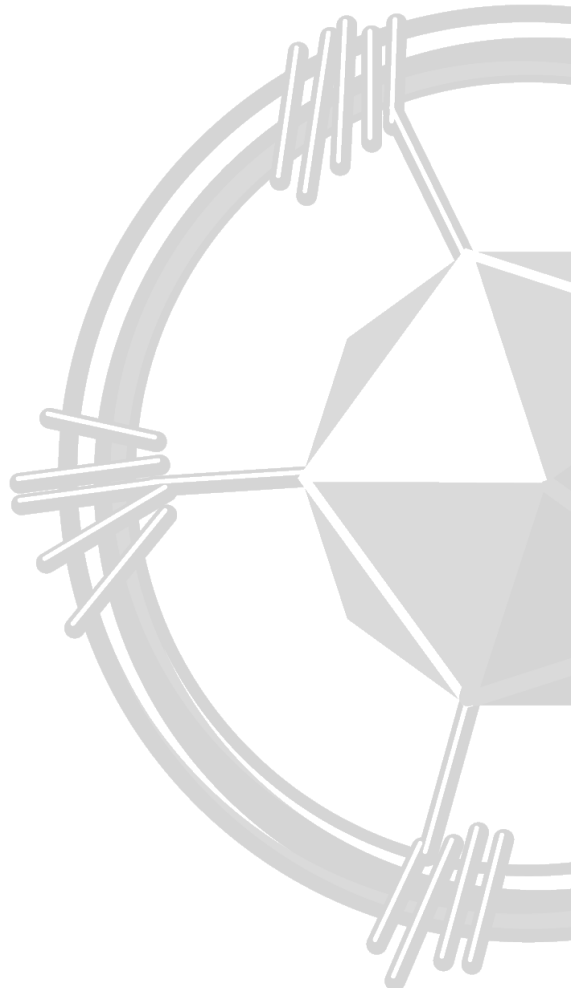
RFP NUMBER: RFQ/CFO/25/26/014			
CLOSING DATE	02/05/2025	CLOSING TIME	12:00

SUPPLY CHAIN CONTACTS AND ENQUIRIES	
Full Names	Asisipho Matomane
Contact Number	010 219 3293
Email Address	AMatomane@merseta.org.za
RFP Email Address	quotations@merseta.org.za

Document Title	Request for Proposal(s)		
Document Number	FIN-TP-001(B)	Revision Date	03 June 2024
Page Number	Page 1 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled
Reviewed: Senior Manager: Supply Chain and Contract Management		Controlled: Chief Executive Officer	

Table of Contents

1. Introduction to Request for Proposal (RFP)	3
2. Background Information	3
3. Objectives of the Service	4
4. Duration of the Project	4
5. RFP Submission	5
6. Late submissions of the RFP	5
7. Request for Proposal (RFP) Rules	5
10 RFP Evaluation Process	5



Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 2 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

1. Introduction to Request for Proposal (RFP)

1.1 The Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA) is a Schedule 3A public entity established in terms of the Skills Development Act (Act No. 97 of 1998), Registration Number 17/merSETA/01/04/20, to facilitate skills development for the Metal and Engineering, Motor Retail and Components Manufacturing, Automobile Manufacturing, Plastics Manufacturing and New Tyre Manufacturing Sectors Automotive Components Manufacturing Chamber.

The merSETA is inviting potential service providers to submit the proposal for the services described under scope of work.

1.2 The merSETA requires to appoint a professional, qualified and experienced independent service provider to provide Project management capacity services relating to old, slow moving and non- performing contracts.

The service provider must demonstrate capacity experience in project management and provide relevant qualification(s) of the allocated resources.

Resources Required for execution of work:

- Two (02) qualified Project management individuals.

1.3 This RFP process is subject to section 51(1)(a)(iii) of the Public Financial Management Act (PFMA) of 1999, Treasury Regulations 16A6.1, Preferential Procurement Policy Framework Act (Act No. 5 of 2000) and the Preferential Procurement Regulations (2022 Regulations).

2. Background Information

merSETA's primary function is to facilitate skills development through learning programmes. This is achieved by disbursing grants to employers and skills development providers to offer training to employed and unemployed learners through Discretionary Grant Contracts.

The merSETA, as a public entity, is audited by the Auditor General of South Africa (AGSA).

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 3 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

During the audit of the 2023/2024 financial year audit, The Auditor General of South Africa, in their management report noted that The public entity's verification processes of skills development providers, including monitoring of the projects and authentication of learner information are not adequate to ensure training interventions are implemented as intended. Furthermore, it was highlighted that a lack of effective project management and monitoring of Project is one of the main causes of the SETA not achieving its annual performance targets.

To this end, merSETA is requesting the services of a skilled Project Managers with CA (SA) qualification, or equivalent project finance qualification, with project monitoring and SETA knowledge that will assist the seta in reviewing the performance of contracts that have been identified as old, slow moving and non-performing. Project management experience Audit experience Seta experience will be advantageous.

3. Objectives of the Service

- a) To review Project Department's methodology for identifying slow moving and non-performing contracts and assess whether it is adequate for the intended purpose.
- b) Perform a review of the state of contracts that Management has identified as being either non-performing, expired and or slow moving. The review will include, but not limited to:
 - i. Desktop evaluation, which include creating a template for stakeholders to complete and return to the appointed service provider.
 - ii. Interview of the responsible project manager from the merSETA.
 - iii. Inspect supporting documents to verify the stage of the contract in terms of reporting, payments and training.
 - iv. Project visit for Projects identified as high risk.
- c) Compile a report to the Executive on findings for the selected projects.
- d) Provide Recommendations and improvements with regards to ensuring effective and efficient project monitoring.

4. Duration of the Project

The duration of the project is determined by the below table:

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 4 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

Output	Timeline
Deliverables dependent as per scope of work.	Three (03) months from the appointment date.

5. RFP Submission

- 5.1 Bid documents may be emailed to quotations@merseta.org.za on or before the closing date and time.
- 5.2 The merSETA will only consider bid documents received on or before the closing date and time, submitted to the prescribed email address.

6. Late submissions of the RFP

Submission of quotation(s) received late (after the closing date and time) will not be considered.

7. Request for Proposal (RFP) Rules

7.1 The following rules will apply for this Request for Proposal:

- 9.1.1 The price(s) quoted shall be valid for a minimum period of sixty (60) days from the closing date and time of this RFQ.
- 9.1.2 The price(s) quoted must be firm and inclusive of value-added tax (VAT) where applicable.
- 9.1.3 The price(s) must include all related expenses, i.e., disbursements, transport, accommodation, etc. (where applicable).
- 9.1.4 A potential supplier or service provider must be registered on the Central Supplier Database (CSD), hosted by The National Treasury.
- 9.1.5 Only an official purchase order or appointment letter issued by the merSETA will bind the merSETA.

10 RFP Evaluation Process

10.1 The RFQ will be evaluated in terms of PPPFA 05 of 2000 and Preferential Procurement Regulation 2022 (80/20). Received bids will be evaluated in three (3) stages of evaluation process outlined below:

10.1.1 Evaluation Stage 1: Administration Compliance Screening

All bidders must comply with the administrative requirements outlined in the Standard Bidding Documents and the administrative requirements listed below. Failure to comply

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 5 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

with the minimum administrative compliance requirements below may lead to the disqualification of the service provider's proposal.

- Resources allocated to the project demonstrable project management capacity experience. (Reference letter from SETAs or any Public sector entity indicating the individuals/firms capability rendering project management)
- SARS Tax Compliance Status pin
- Proof of registration summary report from Central Supplier Database or provide the MAAA number
- Fully completed Standard Bidding Document (SBD) 4
- Fully completed Standard Bidding Document (SBD) 6

10.1.2 Evaluation Stage 2: Technical Evaluation

Note: Technical scoring will be on a sliding scale as per the below table:

Score	Description
1	Poor
2	Average
3	Good
4	Very Good
5	Excellent

Bidders are expected to meet a minimum threshold of seventy **(70)** points out of possible hundred 100 points on the below technical requirements to qualify to the next stage of price and preference (specific goals), Failure to meet the set minimum threshold of seventy **(70)** points will lead to immediate disqualification.

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 6 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

#	Evaluation Criteria	Descriptive Indicators evidence to be submitted for evaluation	Weights
1	Capacity (experience of the allocated resources)	<p>Company to submit summarized curriculum vitae (CV's) of the allocated resources indicating the years of relevant experience in project management, with Certified Qualifications and professional accreditation.</p> <p>Project Management engagement lead with 07 years' experience within Public Sector.</p> <p>CA(SA)</p> <p>Must be registered with both SAICA and IRBA.</p> <p>Project management Associate with 07 years' experience within Public Sector with Certified Qualifications and professional accreditation.</p> <p>BCom Hons/CTA and completed articles/ post articles experience within Public Sector.</p> <p>Note: The membership letter from the association must be valid and not be older than three (03) months confirming membership status and good standing.</p> <p>Student memberships do not apply.</p>	<p><u>Total points allocated for experience = 40</u></p> <p><u>Project Management engagement lead points allocation (20):</u></p> <ul style="list-style-type: none"> Fully comply – 7 years or more relevant experience = 5 points 6 years of relevant experience = 4 points 5 years of relevant experience = 3 points 4 years of experience = 2 points 3 years and less of relevant experience = 1 point No experience = 0 point <p><u>Project Management Associate points allocation (20)</u></p> <ul style="list-style-type: none"> Fully comply – 7 years or more relevant experience = 5 points 6 years of relevant experience = 4 points 5 years of relevant experience = 3 points 4 years of experience = 2 points 3 years and less of relevant experience = 1 point No experience = 0 point

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 7 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

#	Evaluation Criteria	Descriptive Indicators evidence to be submitted for evaluation	Weights
2	Signed Reference letters from clients (on client letterhead where applicable) for whom similar work was conducted.	<p>The bidder must submit a minimum of three (3) signed relevant reference letters where the similar services was conducted within the public sector/entity.</p> <p>The reference letters must clearly state the period of the project undertaken and must be on the client company letterheads and include verifiable contact details.</p> <p>The merSETA reserves the right to contact the references submitted for verification and service rating.</p> <p>Note: Appointment letters will not be considered as reference letters.</p>	<p>Total points allocated for reference letters = 30</p> <p>5 relevant letters = 5 points 4 relevant letters = 4 points 3 relevant letters = 3 points 2 relevant letters = 2 points 1 relevant letter = 1 point 0 relevant letter = 0 points</p>
3	Methodology and project plan	<p>The bidder must submit a comprehensive methodology and detailed project plan covering all areas of the project scope, clear allocation of resources tasks and deliverables clearly outlined. demonstrate how skills will be transferred the merSETA staff.</p>	<p>Total points allocated for methodology and project plan = 30</p> <p>comprehensive methodology and detailed project plan covering all aspects = 5 points</p> <p>partial methodology and project plan submitted = 2 points</p> <p>No methodology and project plan submitted = 0 point</p>
TOTAL WEIGHTING			100
MINIMUM WEIGHTING SCORE			70

Note: bidders who did not meet the minimum threshold of seventy (70) points out of possible hundred (100) points will be eliminated and not considered for further evaluation of price and specific goals.

10.1.3 Evaluation Stage 3: Preference Point System

Bids will be evaluated in terms of the preferential procurement regulations 2022.

The 80/20 preference point system shall be applicable to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price and 20 points represent the specific goals.

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 8 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

Resources required and pricing schedule

- Total project amount breakdown detailing tasks allocations and project plan for the allocated two (02) qualified Project management resources for a period of three (03) months.

The following minimum resources rates are required to determine a comparative pricing schedule:

Allocated Resources	Rate Per Hour (Incl. of VAT)
Project Management lead	R
Project management Associate	R
<p>Disbursements Costs: bidders must indicate travelling expenses, accommodation, disbursements etc., on their proposals</p> <p>Disbursement Costs guide:</p> <p>Travel: AA rates</p> <p>Air Travel: Standard – Economy Class</p> <p>Accommodation: Standard Class – 3 star graded establishment</p> <p>All Subsistence and travel will be re-imbursed at AA rates and actual accommodation.</p> <p>NB: Before any trip where disbursement costs will be incurred, bidders should obtain prior approval from the merSETA, project owner.</p> <p>The project will be executed at the merSETA, head office in Gauteng.</p>	

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 9 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

The bid documentation's table below will award points to a bidder for achieving the specific goals.

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Tenderer who has 51% to 100% black people ownership	6	
Tenderer who has 30% to 100% black women ownership	4	
Tenderer who has 30% to 100% black youth ownership	4	
Tenderer who has 30% to 100% White women ownership	2	
Tenderer who has 20% or more owners with disability	4	
Total Points allocated to Specific Goals	20	

Note: Refer to Annexure A for Proof or documentation that may be considered to claim points for specific goal related to persons or categories of persons historically disadvantaged by unfair discrimination.

11 Cost Proposal

11.1 All prices must be VAT inclusive (where applicable) and must be quoted in South African Rand (ZAR).

11.2 The rates of remuneration will be subject to negotiation, not exceeding the applicable rates as contained in the guidelines:

11.2.1 The “Guideline on Fees for Audits done on behalf of the Auditor-General of South Africa (AGSA)”¹ as issued by the South African Institute of Chartered Accountants (SAICA);

11.2.2 The “Guide on Hourly Fee Rates for Consultants”, as issued by the Department of Public Service and Administration (DPSA); and/or

11.2.3 Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant.

12 merSETA’s RIGHTS

12.1 The merSETA is entitled to amend any bid condition, bid validity period, RFP terms of reference, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the merSETA has records of such bidders, may be advised in writing of such amendments in good time, and any such changes will also be posted on the merSETA’s website under the relevant tender

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 10 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

information. Therefore, before submitting their bid response, prospective bidders should regularly check the website to stay informed about any amendments related to this matter.

12.2 The merSETA reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the merSETA.

12.3 The merSETA reserves the right to award this bid as a whole or in part.

12.4 The merSETA reserves the right to conduct site visits at bidder's corporate offices and or at client sites if so required.

12.5 The merSETA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in National Treasury Instruction 02 of 2016/2017: Cost Containment Measures, where relevant.

12.6 The merSETA reserves the right to request all relevant information, agreements, and other documents to verify the information supplied in the bid response. The bidder hereby gives consent to the merSETA to conduct background checks, including FICA verification, on the bidding entity and any of its directors, trustees, shareholders or members.

12.7 The merSETA reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers, if applicable (i.e., where a panel is considered).

12.8 The merSETA reserves the right to make a final decision on the interpretation of its tender requirements and responses thereto.

12.9 The merSETA reserves the right to consider the professional conduct and experiences it had with any bidder that rendered similar services to the merSETA in the past 5 years over and above the references put forward by the bidder in its response.

13 UNDERTAKINGS BY THE BIDDER

13.1 By submitting a bid in response to the RFP, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the merSETA on the terms and conditions and in accordance with the specifications stipulated in this RFQ document.

13.2. The bidder shall prepare for a possible presentation should merSETA require such, and the bidder will be required to make such a presentation within five (5) days from the date

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 11 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

the bidder is notified or such a time determined by merSETA of the presentation. Such a presentation may include a practical demonstration of products or services as called for in this RFP.

- 13.3. The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the merSETA during the bid validity period indicated in this RFP, and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 13.4. 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 for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- 13.5. The successful bidder accepts full responsibility for the proper execution and fulfillment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with merSETA, as the principal(s) liable for the due fulfillment of such a contract.
- 13.6 The bidder accepts that all costs incurred in the preparation, presentation, and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with the bid will become merSETA property unless otherwise stated by the bidder(s) at the time of submission.
- 13.7. Should the bidder require to cede a portion of service(s) in relation to the award, the bidder must inform the merSETA in writing and merSETA reserves the right to accept or reject.

ANNEXURE A

Specific Goal Guide – Preferential points (80/20)

This specific goal guide will be used to assist providers in submitting relevant documents to confirm specific goals.

“**Specific goals**” means specific goals as contemplated in section 2 (1) (d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of Reconstruction and Development programme as published in government gazette No. 16085 dated 23 November 1994.

Please note that:

- **Financial account, management account or auditors’ letter should be submitted confirming turnover of the company determining BBBEE status on Affidavit and B-BBEE CIPC certificate in order for the specific goals can be awarded.**

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 12 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

Preferential points for tenders without local content requirements.

?

Specific goal	80/20 Preference Point system	Example of Submission	Tick if relevant document submitted	Indicate which document have been submitted
Black People Ownership – 51% or more	6	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Women Ownership – 30% or More	4	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Youth Ownership – 30% or More	4	Valid BBEE certificate/Affidavit or B-BBEE CIPC		
White Women Ownership – 30% or More	2	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
People with Disability (PwD) Ownership	4	Medical certificate		
Total Points allocated to Specific Goals	20			

Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 13 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled

AUTHORISATION SIGNATORIES TO CONFIRM RFP			
The employee signing below hereby affirms the accuracy of the information requested for the proposal.			
Supply Chain Management Representative			
Full Names	Asisipho Matomane	Date	25/04/25
Signature			
Technical Representative			
Full Names		Date	
Signature			



Document Title	Request for Proposal(s)		
Document Number	FIN-RFP-001(B)	Revision Date	03 June 2024
Page Number	Page 14 of 14	*Next Revision Date	31 March 2030
Revision Number	Rev 00	Access	Controlled