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NORTHERN CAPE

Bobby's Walk Building
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Fax: (053) 832 0047

NORTH WEST

Sparkling Office Park
78 Retief Cnr Peter
Mokaba Street
Potchefstroom, 2531
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Fax: (018) 294 5719

WESTERN CAPE

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2 Old Paarl Road
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Education, Training and Development Practices Sector Education and Training Authority

SCMU NO: 07 - 2022/23

REQUEST FOR BIDS

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE CHANGE MANAGEMENT AND ALIGN THE ORGANISATIONAL STRUCTURE TO THE ETDP SETA STRATEGY

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 to advance skills levels in accordance with the National Skills Development Skills Plan (**NSDP**). The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce in order to benefit employers, workers and employees in the ETD sector.

The ETDP SETA will host a **COMPULSORY** virtual briefing session for **BID NO: SCMU: 07 - 2022/23** for the **facilitation of change management and aligning of the organisational structure to the ETDP SETA strategy**, on **15 November 2022** at **11h00**. Interested members must please communicate their interest to join in the session, **before 11 November 2022**. To attend and get access to the session, please email: TienieJ@etdpseta.org.za with your Name, Surname, Company Name, Email address and Cellphone Number. Access details **will only be shared** with those that confirmed. **Please do not forward the link further**. We thank you for your cooperation.

NB: THE MEETING ROOM FOR THE COMPULSORY BRIEFING SESSION WILL CLOSE AT 11H15.

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

2. PURPOSE

The ETDP SETA has developed a 5-year Strategic Plan 2020 - 2025 that outlines in detail outcomes and deliverables that will enable the organisation to achieve its mandate. A need therefore exists for the review of the organisation's existing structure to align it with the revised Strategic Plan to:

- ensure that the organisational structure is responsive to the mandate and vision of the ETDP SETA,
- address a silo approach on execution of the SETA mandate which is having an adverse impact towards service delivery,
- address lack of synergy on systems, processes and functions to continuously improve the performance of the organisation,
- correct misalignment between the strategic plan and the existing structure to ensure seamless service delivery; and
- review the competency framework currently used by the ETDP SETA and conduct a skills audit assessing current and future skills that will be required and provide a report on the current skills

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that exist within the organisation, the identified skills gaps and proposed interventions to address the identified gaps.

The ETDP SETA has a total of 144 employees, stationed at Head Office and across the nine (9) Provincial Offices.

3. PROJECT SCOPE / DELIVERABLES

3.1. PROJECT DELIVERABLES

- 3.1.1. A comprehensive Project Implementation Plan outlining deliverables and timeframes;
 - 3.1.1.1. Consultations with the relevant stakeholders should be included
- 3.1.2. Change management strategy and implementation plan;
- 3.1.3. Organisational culture survey and produce a report with recommendations;
- 3.1.4. Service Delivery Model;
- 3.1.5. Mapping of Business Processes/ Flowcharts;
- 3.1.6. Organisational structure aligned to mandate, strategy and operating model. The organisational structure should be costed;
- 3.1.7. Work measurement analysis report and proposed staffing norms;
- 3.1.8. Job profiles for posts in proposed organisational structure;
- 3.1.9. Revised competency framework for different performer levels;
- 3.1.10. Conduct a Skills audit and produce a report with recommendations;
- 3.1.11. Develop a Migration Plan;
- 3.1.12. Skills Transfer;
- 3.1.13. Business case; and
- 3.1.14. Close-out report.

4. SCOPE OF WORK

The successful service provider is expected to provide the following services as indicated below:

4.1. CHANGE MANAGEMENT

- 4.1.1. Conduct change and organisational readiness survey (i.e., survey of the organisational culture, behaviour, leadership and critical dimensions),
- 4.1.2. Facilitate change management sessions for leadership and employees,
- 4.1.3. Develop change management interventions and programs for implementation, and
- 4.1.4. Train identified change agents

4.2. ORGANISATIONAL STRUCTURE REDESIGN

- 4.2.1. Analyse the core mandate and strategy of the organisation,
- 4.2.2. Organisational structure should take into consideration the legislative prescripts that govern the operations of the ETDP SETA,

- 4.2.3. Propose an effective and efficient organisational structure that supports the geographical footprint of the ETDP SETA,
- 4.2.4. The organisational structure should show the relationship between functions and must include a recommended span of control to meet workloads for each division,
- 4.2.5. The proposed structure must be costed and take into consideration the future needs of the organisation,
- 4.2.6. High level functions and deliverables for each role to be included; and
- 4.2.7. Develop job profiles for all jobs in the proposed organisational structure.

4.3. SERVICE DELIVERY MODEL (SDM)

- 4.3.1. Develop an integrated SDM linked to organisational mandate and strategy,
- 4.3.2. Report on the value chain of the functions,
- 4.3.3. Identify areas of improvement in relations to functions performed by the ETDP SETA,
- 4.3.4. Conduct a gap analysis between the strategic orientation and operational capacity of the ETDP SETA and recommend an appropriate operating model that responds to the organisation's strategic direction and priorities.

4.4. BUSINESS PROCESS MAPPING

- 4.4.1. Conduct step by step business process mapping and benchmarking with other organisations of a similar nature,
- 4.4.2. Map processes to guide planning, decision-making, coordination, monitoring and accountability processes between Head and Provincial Offices,
- 4.4.3. Analyse systems supporting business processes in the organization and identify improvement opportunities,
- 4.4.4. Conduct training on new processes, and
- 4.4.5. Develop a continuous process improvement plan.

4.5. WORKLOAD MEASUREMENT

- 4.5.1. Define methodology / techniques for the workload measurement,
- 4.5.2. Conduct scientific work measurement processes,
- 4.5.3. Determine staff provisioning norms/ratios,
- 4.5.4. Clearly define standards,
- 4.5.5. Conduct workflow analysis,
- 4.5.6. Conduct work balance measurement / volumetrics, and
- 4.5.7. Propose staff/post establishment to meet the workloads for each Division.

4.6. REVIEW COMPETENCY FRAMEWORK

- 4.6.1. Revise the current competency framework being implemented by the ETDP SETA to make it responsive to the needs of the modern workplace; and
- 4.6.2. Develop a competency dictionary for the different performer levels.

4.7. CONDUCT SKILLS AUDIT

- 4.7.1. Develop a Methodology and Framework that will be used to reflect the skills that exist within the ETDP SETA;
- 4.7.2. Develop a skills audit project plan and the approach to conduct the skills audit
- 4.7.3. Conduct skills gap analysis per division/unit against technical, functional, leadership skills and competencies;
- 4.7.4. Conduct a comprehensive skills gap analyses based on both current and future needs of the organisation;
- 4.7.5. Produce a Skills Audit Report indicating a breakdown of the skills in different divisions/units and recommend interventions to address the identified skills gaps.

4.8. DEVELOP A MIGRATION PLAN

Following a Skills Audit, the Service Provider should develop a migration plan that will be used for the following:

- 4.8.1. To plan the reskilling of employees where necessary, and
- 4.8.2. For matching and placing of employees in different positions in line with the skills and expertise they possess.

4.9. SKILLS TRANSFER

The Service Provider should capacitate the HR Team and provide a toolkit, training manuals and training workshop for the team to be able to maintain the project outcomes.

4.10. THE SERVICE PROVIDER IS EXPECTED TO:

- 4.10.1. Provide a maximum of five (5) evidence of track record in a similar assignment undertaken.
- 4.10.2. Provide a maximum of five (5) references on the company's letterhead who can provide an objective assessment of the project previously undertaken.
- 4.10.3. Sign the SLA with the ETDP SETA which will include specific contractual obligations should the Service Provider be successful.
- 4.10.4. The service provider will report directly to the Corporate Services Manager / Head of Human Resources when rendering the service.
- 4.10.5. The qualifications of the Project Manager
 - 4.10.5.1. Master's degree qualification: MBA/ MBL/ Human Resource Management/ Operations Management/ Organisational Development or Honours or Post-graduate Diploma in Human Resource Management/ Operations Management/ Organisational Development

- 4.10.6. The required experience of the Project Manager
 - 4.10.6.1. At least 10 years of experience in managing a similar project.
- 4.10.7. The appointed provider must at least have a minimum of 4 Consultants in their Project Team.

5. PROJECT REQUIREMENTS

- 5.1. The ETDP SETA requires services of a suitable service provider to facilitate change management, conduct an Organisational Structure Review and Skills Audit Assessment as a holistic service.
- 5.2. Bid documentation that do not comply, will be eliminated from the evaluation process.
- 5.3. SETA reserves the right not to award a bid.

6. DURATION

The ETDP SETA will enter into a **six (6) months** Service Level Agreement (SLA) with the successful service provider.

7. COSTING MODEL (PRICE SCHEDULE)

7.1. COST COMPARISON FOR THE APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE CHANGE MANAGEMENT AND ALIGN THE ORGANISATIONAL STRUCTURE TO THE ETDP SETA STRATEGY

NB: Costing should also be inclusive of a detailed costing breakdown inclusive of hourly rates, number of hours and total cost per deliverable for the duration of the project.

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

Name of Organisation:			
ITEM DESCRIPTION	RATE PER HOUR	NUMBER OF HOURS	TOTAL COST FOR 6 MONTHS
1. CHANGE MANAGEMENT			
2. ORGANISATIONAL CULTURE SURVEY			
3. ORGANISATIONAL STRUCTURE REDESIGN			
a. Service Delivery Model (SDM)			
b. Business Process Mapping			
c. Workload Measurement			
d. A costed and futuristic organisational structure			
4. REVIEW COMPETENCY FRAMEWORK			
a. Revise the current competency framework			
b. Develop a competency dictionary for the different performer levels			
5. CONDUCT SKILLS AUDIT			
a. Develop a migration plan			
b. Conduct matching and placing			
6. SKILLS TRANSFER			

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7. PRESENTATION OF THE FINAL REPORTS (including business case and close out report)			
SUB-TOTAL			
VAT (if applicable)			
TOTAL COSTS			
		<p>.....</p> <p><i>Signature of Bidder</i></p>	

8. EVALUATION CRITERIA

THE ETDP SETA applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2017. The evaluation will be guided by ETDP SETA procurement policy.

Folder A (USB) must have documents for Stage 1 and Stage 2

8.1. STAGE 1 [Folder A (USB)]

Bidders will be evaluated on the submission of the requested mandatory documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked.

8.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION

1. Declaration of Interest – SBD 4 (New)

NB: Failure to fully complete and submit any of the above-requested mandatory documents will lead to disqualification.

8.2. STAGE 2 [Folder A (USB)]

In this stage, the evaluation of bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid document.

- (a) The minimum qualifying score for functionality will be **70 points** and bids that fail to achieve the minimum qualifying score will be eliminated.
- (b) Only quotes that achieved the minimum qualifying score for functionality will be evaluated further in accordance with the 80/20 (as stated in Evaluation Criteria on page 6 A and B) preference point systems prescribed in Preferential Procurement Regulations **5 and 6**.

The evaluation criteria for functionality will be as below:

NO.	QUALIFYING CRITERIA	POINTS
1.	<p>Experience & References of service providers in doing business of a similar nature = 30</p> <p>1.1. Company Experience: experience of the company in conducting similar projects in organisational design/ development = (15)</p> <ul style="list-style-type: none"> 5 years and above = 15 3 to 4 years = 10 1 to 2 years = 5 <p>1.2. Contactable reference: Five (5) Reference letters are required. References must be on the referee's company letterhead. (15)</p> <ul style="list-style-type: none"> 5 references or more = 15 3 - 4 references = 10 1 - 2 references = 5 <p>*Each reference must clearly indicate:</p> <ul style="list-style-type: none"> the name of the bidder and the project objectives of the project (nature of the project) duration of the project recommendation and contact details of the referee as well as proof of completed project(s) and must be signed. <p>NB: If any of the above information is omitted/missing, will lead to the reference letter(s) not allocated points.</p>	30
2.	<p>Composition of the Project Team, Qualifications, and experience (attach CVs indicating experience and certified copies of academic qualifications):</p> <p>2.1 Qualifications of Project Manager = 10</p> <ul style="list-style-type: none"> Master's degree qualification: MBA/ MBL/ Human Resource Management/ Operations Management/ Organisational Development = 10 Honours or Post-graduate Diploma in Human Resource Management/ Operations Management/ Organisational Development = 5 Qualification below Honours / Post-graduate Diploma = 0 	40

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	<p>2.2 Qualifications of Consultants = 10</p> <ul style="list-style-type: none"> Honours / Post-graduate Diploma in Human Resource Management/ Operations Management/ Organisational Development = 10 B-Degree in Human Resource Management/ Operations Management/ Organisational Development = 5 Qualification below a Bachelor's Degree = 0 <p>2.3. Experience of the Project Manager: 10</p> <p>Relevant experience of a Project Manager in managing similar organisational design/development projects:</p> <ul style="list-style-type: none"> 10 years or more of work experience = 10 7 to 9 years of work experience = 7 4 to 6 years of work experience = 5 1 to 3 years of work experience = 3 <p>2.4. Experience of the Project Team (attach CV): 10</p> <p>Relevant experience of each Project Team member in implementation of related work:</p> <ul style="list-style-type: none"> 5 or more years of work experience = 10 3 – 4 years of work experience = 5 1 – 2 years of work experience = 3 <p>NB: Please also note that project personnel will only be changed with the approval of the ETDP SETA.</p>	
3.	<p>Detailed and comprehensive methodology on how the below deliverables will be achieved/implemented in the delivery of the service: 30</p> <p>3.1. A comprehensive Project Implementation Plan outlining deliverables and timeframes;</p> <p>3.1.1. Consultations with the relevant stakeholders should be included</p> <p>3.2. Change management strategy and implementation plan;</p> <p>3.3. Organisational culture survey and produce a report;</p> <p>3.4. Service Delivery Model;</p> <p>3.5. Mapping of Business Processes/ Flowcharts;</p> <p>3.6. Work measurement analysis report and proposed staffing norms;</p> <p>3.7. Organisational structure aligned to mandate, strategy and operating model;</p> <p>3.8. Job profiles for posts in proposed organisational structure;</p> <p>3.9. Review Competency Framework;</p> <p>3.10. Conduct a Skills audit and produce a report;</p> <p>3.11. Develop a Migration Plan;</p> <p>3.12. Skills Transfer;</p> <p>3.13. Business case; and</p> <p>3.14. Close-out report.</p> <ul style="list-style-type: none"> The service provider meets all of the above listed deliverables = 30 The service provider does not meet all of the above listed deliverables = 0 <p>NB: The project plan must be in line with timelines for the delivery of the service.</p>	30
Total		100

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

Please take note of the value and scoring point system of your bid.

8.3. STAGE 3 [(Folder B) [USB]

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. Submit a "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**
- c. Invitation to Bid - **SBD1**
- d. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 - **SBD 6.1 (If claiming preferential points)**
- e. B-BBEE certificate or sworn affidavit (**If claiming preferential points**), **Should the bidder submit both the certificate and sworn affidavit with different B-BBEE levels, the bidder will not be awarded points**

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

✓	Price	80
✓	B-BBEE status level of contributor	20

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.

NB: PLEASE NOTE THAT INCLUSION OF THE FINANCIAL PROPOSAL IN FOLDER A WILL LEAD TO DISQUALIFICATION.

9. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. The ETDP SETA reserves the right not to award the RFB
2. ETDP SETA does not bind itself to appoint a bidder with the highest points.
3. ETDP SETA reserves the right to negotiate the bidder's price.
4. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
5. Bids which are late, incomplete, unsigned or submitted by facsimile and/or email will **NOT** be accepted.
6. 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 eligible for empowerment points.
7. 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 and level of black ownership to claim points.
8. 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 claim points as prescribed.
9. **B-BBEE Certificates obtained from Accountants/ Auditors after 31 December 2016 will no longer be accepted.**
10. 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 eligible for empowerment points. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
11. 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 preference points for B-BBEE status level of contribution are not claimed.
12. Bids submitted are to hold good for a period of 90 days.
13. 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.
14. 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.
15. Companies that are in the process of **de-registration in the CIPC** will not be considered.
16. Service Provider must provide proof of Public Liability Insurance.
17. The ownership of the material generated during the evaluation shall remain the property of the ETDP SETA.

10. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain Management > Open Tenders as from **12h00** on **03 November 2022**.

Bidders must submit technical and financial proposals in **two separate USBs** clearly marked **“Folder A- Technical Proposal”** and **“Folder B- Financial Proposal”**.

Folder B - (Financial Proposal) must include the Costing Model (*Price must be final, include VAT and signed*), Submit a *“Unique security personal identification number (PIN) issued by SARS”* which the SETA will use to verify the bidder’s tax matters, Invitation to Bid - **SBD1**, Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 -**SBD 6.1 (If claiming preferential points)**, and B-BBEE certificate or sworn affidavit (*If claiming preferential points*) **Should the bidder submit both the certificate and sworn affidavit with different B-BBEE levels, the bidder will not be awarded points.**

The financial proposal will only be opened when the tender is responsive in Stage 2 or at the discretion of the ETDP SETA.

All Bids/Proposals **must be hand/ courier delivered to:**

The ETDP SETA – Head Office
ETDP SETA House
2-6 New Street
Ghandi Square
Johannesburg South - CBD
2091

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of 11h00 on **30 November 2022**.

No late submission will be accepted!

11. CLOSING DATE

All proposals should reach the ETDP SETA Offices on or before 11h00 on **30 November 2022**.

12. CONTACT PERSON

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. **ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID.** All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain: Email: Tenderers@etdpseta.org.za

Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.