

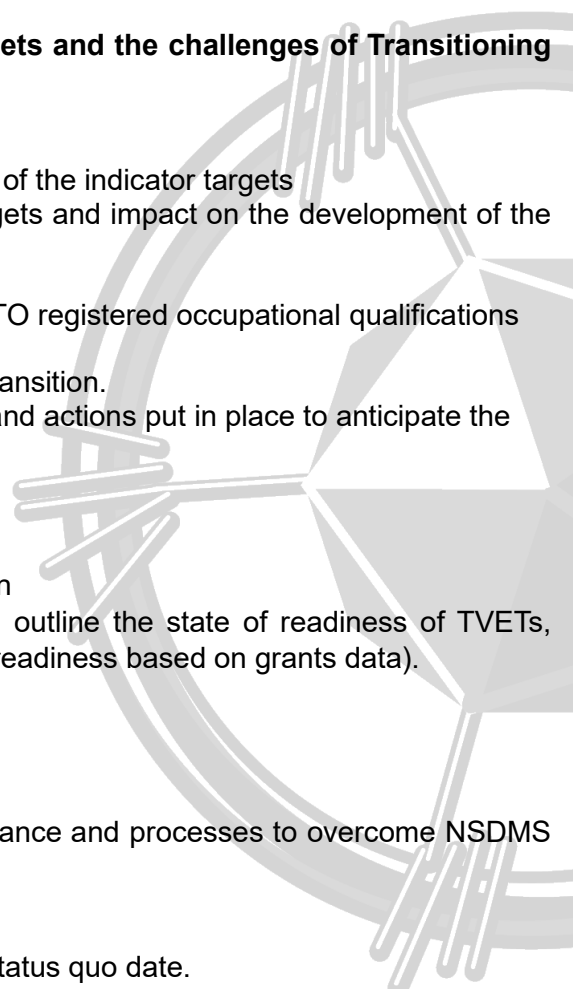
Request for Quote Specifications: Facilitation Services for the merSETA Governance and Strategy Committee (GSC) 2-DAY Workshop to Assess Challenges in Transitioning to Occupational Qualifications for the 2024/25 Year.

1. PURPOSE OF THE WORKSHOP

The purpose of the workshop is to review challenges and the readiness of the mer sector stakeholders to transition to the new QCTO registered occupational qualifications in which are replacing N1, N2 and N3. The workshop will explore the implications of the transition and the requirements to ensure the readiness of the merSETA and its skills development providers (SDPs). The workshop will also review the performance of the merSETA National Skills Development Management System (NSDMS) and concerns regarding the requirements and application of B-BBEE in merSETA.

Objectives of the merSETA GSC workshop (2 full day workshop):

DAY 1 (9am – 4pm): Understanding the SETA Targets and the challenges of Transitioning to Occupational Qualifications

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- i. DHET set targets:
 - DHET to present a background and outline of the indicator targets
 - merSETA to present a response to the targets and impact on the development of the APP.
 - ii. Analysis of the challenges to transition to new QCTO registered occupational qualifications that are replacing N1, N2 and N3
 - QCTO to present the requirements of the transition.
 - merSETA to present its state of readiness and actions put in place to anticipate the phasing out of legacy qualifications.
 - Discussion
 - Summary of conclusions
 - iii. Identifying Key Issues/impediments to the transition
 - Training Provider Preparedness (DHET to outline the state of readiness of TVETs, merSETA to provide an evaluation of SDP readiness based on grants data).
 - Discussion
 - Summary of conclusions
 - iv. Update on NSDMS
 - merSETA to present an update on performance and processes to overcome NSDMS related challenges.
 - Discussion
 - Summary of conclusions
 - Reflections on the NSDMS trajectory and status quo date.
 - v. B-BBEE
 - Requirements and application of B-BBEE in merSETA
 - Discussion
 - Summary of conclusions

DAY 2 (9am – 3pm): Centres of Specialisation (CoS), The importance of Work Integrated Learning (WIL) and Internship Programmes

- i. Appraisal of the academic year and DHET Centres of Specialisation project findings
 - Explanation of the Academic Year Structure (merSETA ACEO)

- Assessment of Employers' and Labour's Preferences *vis-à-vis* the academic year structure (employer and labour – open discussion)
- Review of the DHET Centres of Specialisation project findings (merSETA ACEO)
- Discussion
- Summary of conclusions
- ii. Work integrated learning (WIL) & Internship Programmes
 - The importance of workplace exposure for TVET students
 - Opening up the workplace as a training space
 - Evaluate progress to enhance absorption.
 - Putting in place strategies for improvement
 - Assessing merSETA data – TVET students without diplomas or partial fulfilment of requirements for diploma due to unavailability of workplaces.
 - Application trends for apprenticeships, learnerships and internships
 - Discussion
 - Summary of conclusions
- iii. Wrap-up & Closure
 - Summary of conclusions by facilitator
 - Closing remarks

2. BACKGROUND & CONTEXT

The merSETA GSC invited AA members comprises of twenty-four (24) members including independent committee members. Members of the GSC are drawn from organised labour, employers, professional bodies, and communities. The 2-day workshop will also be attended by the merSETA ACEO, ACFO, ACOO, CSE and Acting Executive Manager: Strategy and Research, CIO and additional senior managers and managers will also attend to provide support.

The workshop with the GSC and merSETA management will take place on 13 and 14 June 2024. The workshop will assist the merSETA, its employers and labour to better understand and navigate challenges linked to the key discussion items on the agenda:

- Getting to grips with indicator targets
- Transitioning to the QCTO occupational qualifications as contained in Occupational Qualifications Sub-Framework (OQSF)
- Understanding NSDMS related challenges and mitigation plans
- Understanding the academic year and centres of specialisation
- Better understanding the impact of a lack of workplaces on WIL and Internships

The workshop outcomes will assist in better collaboration and understanding between the merSETA and its stakeholders in overcoming some of the current challenges being experienced in skills development.

Prior to the workshop, the facilitators will be required to meet with merSETA management team and the Chair and Deputy Chair of the GSC to align on the key discussion points, points of emphasis and required outcomes.

3. FACILITATOR REQUIREMENTS

The facilitator (service provider) should have knowledge and experience of:

- Experience in facilitation of strategic sessions at board level.
- Experience working with or rendering services to SETAs or public entities.
- Knowledge and understanding of the SETA mandate and national policy imperatives, particularly as they relate to the manufacturing sector, skills development and the PSET sector.
- Knowledge of current socio-economic context, policies and strategies that impact skills development and the work of SETAs.

- Working knowledge of Skills Development Act, PFMA, Public Audit Amendment Act and the regulations thereof.
- Understanding of the skills policy environment including legislation, regulation, White Paper for PSET, NSDP, the role of SETAs and other bodies such as NSA, QCTO, NAMB, SAQA.
- Achieving outcomes efficiently through the adoption of latest best practice methodologies when facilitating strategic workshops.
- Knowledge of strategic management and governance

4. DELIVERABLES

- Three days preparation, including briefing session with the GSC Chairperson, Deputy Chairperson, ACEO, ACOO and ASRE.
- Two days facilitation
- The final report of the 2-day workshop and the resolutions thereof should be delivered 5 days after the workshop
- The report must document all proceedings, reflect key discussion points and conclusions. Must contain an action list, clear recommendations, and timeframes.
- The final report of the GSC workshop will be recommended for deliberation by GSC and further recommended to the Accounting Authority for deliberations which will feed into the strategic planning documentation of the SETA.

5. EVALUATION OF PROPOSAL

The RFQ will be evaluated in terms of the PPPFA 05 of 2000 and Preferential Procurement Regulation 2022 (80/20). Three (3) stages of evaluation process will be undertaken.

Evaluation Stage 1: Compliance

Compliance with administrative requirements stated in the Standard Bidding Documents and the mandatory requirements as listed below. In this evaluation stage, all bidders that fail to provide the required information and documentation may be disqualified from further evaluation.

Failure to comply with the requirements assessed in stage 1 (compliance), may lead to disqualification of bids.

Criteria Description	Supporting Documents
In the event of the bidder being in a joint venture (JV), a signed JV agreement must be submitted (where applicable)	Signed JV Agreement SBD forms must be completed for each legal entity Consolidated B-BBEE certificate

Bidders must submit a fully complete Bidder's Disclosure form (failure to declare honestly will lead to bidder being disqualified)	Standard Bidding Document (SBD) 4
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Evaluation Stage 2: Functional Criteria

Firstly, the bids will be evaluated for functionality based on the evaluation criteria and the minimum threshold as shown in the table below. **Any bid that fails to meet the overall minimum threshold of 70% or has not received the minimum score for any individual component thresholds will be disqualified for further evaluation on stage 3..**

Each proposal that passed functional evaluation of 70% and more, will be on equal footing to proceed to the final round of evaluation on price and specific goals.

No	Criteria	Description	Points
1.	The bidder demonstrates years' of experience in similar to the scope of work. Experience working with or rendering services to SETAs or public entities is important.	Five (5) years or more of facilitation experience in similar to the scope of work	30
		Less than five (5) years up to four (4) years of facilitation experience in similar to the scope of work	20
		Less than four (4) years up to three (3) years of facilitation experience in similar to the scope of work	15
		Less than three (3) years experience in similar to the scope of work	0
2.	The bidder must provide contactable references where similar service was rendered within the past five (5) years. The merSETA reserves the right to contact the referee. Experience working with or rendering services to SETAs or public entities. Appointment letters will not be regarded as reference letter.	5 or more relevant reference letters attached	15
		4 relevant reference letters attached	10
		3 relevant reference letter attached	5
		No or unsatisfactory reference letter(s) attached	0

No	Criteria	Description	Points
3.	Detailed proposed methodology and project plan	Fully complies - The bidder has provided a detailed explanation of the methodology implementation approach which details how the services will be carried out as outlined in the scope and deliverables and timelines.	35
		Poor or unsatisfactory proposed methodology with no detailed project plan and timeframes.	0
4.	Curriculum Vitae (CVs) and Qualifications of the facilitator members. CVs which must indicate the experience, professional background and qualifications (including relevant valid membership that is certified within 6 months - Failure to submit will disqualify Bidder)	Summarized CVs and relevant qualification(s): a) CV and relevant Master's Degree (NQF 9) = 20 b) CV and relevant Post Graduate Degree (NQF 8) = 18 c) CV and relevant Qualification (NQF 7) = 15 d) No CV and no relevant Qualification = 0	20
TOTAL			100
MINIMUM WEIGHTING SCORE			70

Evaluation Stage 3: Preference Point System

The 80/20 preference point system shall be applicable to this phase, where 80 points represent maximum obtainable points for the lowest acceptable price, and 20 points represents the specific goals. Points will be awarded to a bidder for attaining the specific goals in accordance with the table as listed in the bid documentation.

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.

6.ENQUIRIES SUPPLY CHAIN

SUPPLY CHAIN ENQUIRIES	
Full Names	Karabo Phalo
Contact Number	010 219 3031
Email Address	kphalo@merseta.org.za
RFQ Email Address	quotations@merseta.org.za



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.

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 BBBEE 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			

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

- 2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

- 2.2 Do you, or any person connected with the bidder, have a relationship

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

I, _____ the _____ undersigned,
 (name)..... in
 submitting the accompanying bid, do hereby make the following
 statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	
Signature	Date
.....	
Position	Name of bidder

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 \mathbf{Ps} = \mathbf{80} \left(1 - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left(1 - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right)
 \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) & \text{or} & P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) \end{array}$$

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

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	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm:.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	