



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA



**REQUEST FOR QUOTATION (RFQ): TERMS OF REFERENCE FOR THE
APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE ADMINISTRATIVE AND
PROJECT MANAGEMENT SUPPORT THE MINISTERIAL TASK TEAM (MTT)
CONDUCTING A STRATEGIC REVIEW OF THE NATIONAL SKILLS FUND**



REQUEST FOR QUOTATION (RFQ): TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE ADMINISTRATIVE AND PROJECT MANAGEMENT SUPPORT THE MINISTERIAL TASK TEAM (MTT) CONDUCTING A STRATEGIC REVIEW OF THE NATIONAL SKILLS FUND

1. Purpose of the RFQ

- 1.1. The objective of the request for quotation is to appoint a suitable service provider/consortium to provide administrative and project management support to the Ministerial Task Team (MTT) conducting a strategic review of the National Skills Fund (NSF).
- 1.2. The MTT seeks to appoint a suitable service provider to provide administrative and project management support activities including planning, minute taking, logistics, coordination and preparation of meeting agenda's and documentation, documentation storages, research and report coordination and reviews, and coordinating supply chain and financial management including budget management amongst other activities allocated by the MTT.
- 1.3. The MTT is required to advise the Minister on the mandate of the NSF and its scope of work through recommendations on measures required to ensure that NSF is strategically positioned as an institution with a clear mandate and mission, supported by the necessary structures and capacity for a sustainable future (**Annexure A** – Terms of Reference for the Ministerial Task Team to conduct a strategic review of the National Skills Fund).
- 1.4. The MTT tasks entail a review of the strategic focus of the NSF, its mandate and scope and an analysis of its capacity, systems and organisational structure, in relation to its mandate and mission. The MTT will examine contextual and institutional factors that underpin the current challenges facing the NSF.
- 1.5. The scope of review of the NSF will be from the period 2009 to date and must align with MTT scope of work, with the aim of providing empirically-based analysis insights and recommendation's on the strategic, structural and operational context and envisaged improvement of the NSF. The contextual factors to be considered will include consideration of the international and local benchmarking studies, international and South Africa's socio-economic contextual issues including the



impact of Coronavirus on the NSF, national skills levy system's and policies and any other research and data analysis conducted by the MTT.

- 1.6. The MTT thus seeks to appoint a service provider to provide administrative and project management resourcing to plan, coordinate, report and administer the work of the MTT and service providers appointed to develop reports to inform the MTT's report and recommendations to the Minister. These activities must be managed in line with the approved budget and timeframes of the MTT and the respective projects underpinning the work of the MTT.
- 1.7. The service provider to be appointed must produce a high-quality services/documents within tight timelines.

2. BACKGROUND

- 2.1 The National Skills Fund (NSF) was established in terms of Chapter 7, section (27) of the Skills Development Act (SDA) 97 of 1998, as amended to fund the projects identified in the National Skills Development Strategy (NSDS) and the National Skills Development Plan 2030 (2030). The NSF receives 20% of the funding through the skills development levy, a payroll tax introduced by the Skills Development Levies Act of 2000 in order to encourage learning and development in the workplace. These resources fund training programmes, institutional capacity building, and research in the Post-School Education and Training (PSET) sector.
- 2.2 The NSF is tasked with the responsibility of funding, which is focused on national priorities and providing resources to unlock and catalyse national human development potential. The state is assisted to drive key skills strategies to overcome skills shortage and contributes towards the achievement of the country's developmental objectives.
- 2.3 The Minister of Higher Education, Science and Innovation, Dr BE Nzimande (the Minister) has established an independent Ministerial Task Team (MTT) to conduct a strategic review of the National Skills Fund (NSF). The need for a review is informed by a variety of challenges that the NSF has been experiencing over the years since its establishment as a schedule 3(A) public entity as of 1 April 2012.
- 2.4 Members of the MTT are appointed for a period of six (6) months. At the end of the term, the MTT is expected to submit a report to the Minister, presenting their findings and recommendations thereof. In order to complete its mandate successfully, the MTT



will require services of a suitable service provider to provide administrative and resource support to the Ministerial Task Team (MTT) conducting a strategic review of the National Skills Fund (NSF). .

3. SCOPE OF WORK

3.1 The scope and timelines for the service provider to provide administrative and project management support will be in line with that of the MTT. Overall, the service provider will be required to plan, engage, prepare, coordinate, compile and report on the work of the MTT as well as project management of service providers appointed to prepare reports to inform the work of the MTT. Specifically, the service provider will be required to fulfil the following responsibilities in line with the MTT's scope of work:

- a) Engage and develop a plan to administer and project manage the work of the MTT and the service providers appointed to prepare reports.
- b) Coordinate, schedule and prepare all documentation for MTT meetings timeously.
- c) Attend, scribe meetings of the MTT including following up on matters arising timeously.
- d) Administer and record documentation of the MTT including claims, invoices, reports, amongst other documentation and reports.
- e) Attend and scribe interviews to be conducted by the MTT with different stakeholders.
- f) Search, read, review and consolidate documents submitted to the MTT in order to inform its analysis and reporting.
- g) Administer, securely store and consolidate the empirical data at the disposal of the MTT.
- h) Engage and review documents and information presented to the MTT and draft analyses and reports including the final report.
- i) Perform quality assurance of all reports received from service providers and any other documentation to be prepared and submitted to the MTT, Minister or any other engagement as directed by the MTT.
- j) Present summaries and provide inputs to the discussions of the MTT.



- k) Draft and finalise reports to the MTT for discussion and approval on all aspects of the work of the MTT.
- l) Prepare reports and presentations to the Minister on a monthly basis.
- m) Manage and report on the budget of the MTT.
- n) Coordinate logistics and travel arrangements of the MTT.
- o) Prepare and process all Supply Chain management matters to resource the MTT. This includes preparing terms of reference, appointments and processing of invoices and service delivery management.
- p) Preparing and managing invoices and payments on behalf of the MTT.
- q) Engage and finalise close out report with the MTT, outlining the work of the MTT in line with the terms of reference (Annexure A) that outlines the scope and mandate of the MTT as approved by the Minister. This will indicate the mapping of deliverables of the terms of reference, budget and expenditure as well as any item deemed necessary by the MTT to be included in the close out report.
- r) Prepare and submit a close out report to the MTT for approval, outlining a comprehensive mapping of the deliverables planned and achieved by the service provider. This will be aligned to the service provider project plan to be delivered and approved at the inception of the appointment of the service provider as indicated in section 5 (below). The service provider will agree on the scope and additional areas to be covered in the closeout report with the MTT.

4. Confidentiality

- 4.1 The Service Provider shall be bound by and adhere to strict confidentiality in all the work they will handle. The appointed service provider will be required to sign a confidentiality agreement with the NSF.

5. Deliverables

- 5.1 A plan outlining the project and report deliverables to administer and project manage the work of the MTT.
- 5.2 Schedules and minutes of the MTT meetings.



- 5.3 Reports, invoice and all documentation prepared and submitted to the MTT to be provided in electronic and soft copy.
- 5.4 Claims forms of MTT in line with the budget.
- 5.5 Project Management reports of the service providers appointed to inform the MTT report to be submitted to the Minister.
- 5.6 Budget and expenditure tracking reports on a monthly basis.
- 5.7 Monthly reports on the progress of the MTT work.
- 5.8 Presentations prepared on behalf of the MTT.
- 5.9 Records to support logistics and claim forms linked to the expenditure of the MTT.
- 5.10 Fieldwork reports and/or project reports.
- 5.11 Monthly progress reports to the Minister.
- 5.12 Workshop reports resulting from discussion of drafts reports with MTT ;
- 5.13 Drafting and review of MTT reports and documentation.
- 5.14 Closeout MTT report including attainment of the MTT objectives as per the terms of reference, budget, expenditure and final MTT report submitted to the Minister.
- 5.15 Any other reports or activities as allocated by the MTT for the service provider to prepare and report on.

6. Duration of contract

- 6.1 The MTT will require the services of a service provider for the duration of its term.
The duration of the contract with the service provider/consortium will be effective from date of appointment until February 2022.

7. Competencies/Experience required

- 7.1 It is expected that the service provider/consortium should have knowledge/experience in the following:
 - a) Has at least five years of experience providing administrative and project management services and presentations to stakeholders.
 - b) Has provided similar services in the past three years.
 - c) It would be advantageous if the service provider is knowledgeable of the education sector, innovation systems, government systems, labour market,



skills, labour, further education and implementation in the Post School Education and Training (PSET) system and Science and Innovation systems.

8. Submission of Proposal

- 8.1 The following procedure must be followed for RFQ submission:
 - 8.1.1 The main part of the proposal must clearly state technical section and financial section, wherein the bidder should address all aspects of the exhibits.
 - 8.1.3 Electronic proposals in PDF must be submitted to rfq.nsf@dhet.gov.za.

(Failure to submit the required documentation MAY lead to disqualification)

9. Content of the Technical Section

9.1 The technical section should include the following:

- a) Cover Page
- b) Mandatory documents
- c) Introduction and Executive Summary
- d) Company and contact information of the bidder, including all parties/team members to the consortium where applicable
- e) **Exhibit 1:** The proposal must include all the following documents:
 - Please ensure that these documents that you require are linked to Section 4, APPROPRIATE QUALIFICATIONS, EXPERIENCE, SKILLS AND KNOWLEDGE as well as the EVALUATION CRITERIA in section 7.
 - A short profile of the service provider, as well as the team (team leader and team members), outlining in specific:
 - The team leader should have an appropriate degree in Business Administration and/or Project Management or any other related field;
 - The team leader should have at least five years' experience working with administration and project management;
 - Knowledge, skills and experience in the innovation and/or post-school education and training sector would be advantageous;
 - demonstrating a thorough understanding of the National Skills Fund mandate and the innovation, education, training and skills



development legislative, regulatory and policy framework would be advantageous; and

- Level of project management skills and experience managing projects of this kind and magnitude.
- f) **Exhibit 2:** Proposal outlining the detailed approach and methodology to be applied in providing administrative and project management support. This part must include the following:
- The steps to ensure the administrative and project management resourcing and support have been addressed.
 - Approach to administering and project managing the work of the MTT.
 - It must contain a short description of the envisaged methodology, processes and procedures that the service provider will deploy to ensure that EACH deliverable is achieved at the required level of quality.
 - Administrative and Project Management reporting framework.
 - Furthermore, it must contain an activity sheet and milestone plan showing how the service provider will complete and manage the project.
- g) **Exhibit 3:**
- A table containing the names of all team members, their envisaged roles and responsibilities and the time they will work on the project.
 - An abridged CV of the Team Leader clearly indicating relevant experience and expertise in working in administration and project management.
 - An abridged CV of the person(s) that will do the work, clearly indicating relevant expertise and experience (see APPROPRIATE SKILLS AND KNOWLEDGE above).
 - Certified copies, not older than six months, of the highest education qualification(s) of each team member.
- h) **Exhibit 4:**
- A detailed structure of the bidder's organisation.
 - Past and current clients' references and letters for the past 5 years' indicating experience in project management and administration.
 - Any other supplementary information.
- i) Compulsory request for quotation documents completed in full together with supplementary bidder documents as required. This includes tax certificates and



completed SBD forms for all the bidders and consortium members, where applicable.

10 Content of the Financial Section

- 10.1 The financial section should include the proposed fee.
- 10.2 The proposed fee should include any costs that will be incurred by the bidder, including travel and subsistence expenses. The total price or amount provided will be regarded as the cost of the project, including VAT and applicable taxes.
- 10.3 The price quoted must be a fixed price for the duration of the contract including all related costs such as equipment, communication/data and delivery of the physical reports to NSF offices located at 178 Francis Baard Street in Pretoria or submitted electronically to rfq.nsf@dh.et.gov.za.
- 10.4 The price quoted must be inclusive of all NSF feedback and proposed revisions, with the cost/fee breakdown for all services to be rendered is aligned and updated to the revisions presented to the Service Provider.
- 10.5 NSF shall not incur any additional costs for overtime or weekend work that may be required due to unforeseen delays during the project.
- 10.6 The NSF reserves the right to negotiate rates and costs.



11. Evaluation Criteria

11.1 The following table reflects the evaluation criteria that will be used in evaluating the technical section.

No	Element	Weight
1	<p>Knowledge, skills and experience:</p> <p>a. Key personnel with the relevant qualifications in the field.</p> <p>b. Knowledge, skills and experience in project management and administration</p> <p>Source: Exhibits 1, 3</p> <p>Guideline:</p> <p>Qualifications</p> <ul style="list-style-type: none">❖ Team leader :Relevant Degree in Business Administration and/or Project Management or any other related field / NQF Level 7 and above (5 points – relevant qualification, 3 points – qualification in any other related field, no relevant qualification – 0 points)❖ Team member/s – relevant qualification in Business administration and/or Project Management or any other related field/NQF level 6 (100% of team members have a qualification - 5 points; 75% of team members have a qualification– 4 points, 50% of members have a qualification– 3 points, 25% of team members that have a qualification– 2 points and if no members have qualifications – 0 points) <p>Experience</p> <ul style="list-style-type: none">• Team leader<ul style="list-style-type: none">❖ Experience in project management and administration (more than 5 years - 10 points; 5 years - 6 points; 3 to 4 years – 4 points and less than 3 years – 0 points)• Team Members (10 points maximum sliding scale)<ul style="list-style-type: none">❖ Working with project management and/or administration experience (100% of team members have 5 years experience - 10 points; 75% of team members have 4 years experience– 6 points, 50% of team members have 3 years experience– 3 points, and 50% members have less than 3 years of experience – 0 points)	30
2	<p>Project management skills and experience managing projects of this kind and magnitude (Note that the service provider will manage projects of service providers as well the overall project management of the MTT)</p> <p>Source: Exhibits 1, 3</p>	10



	Guideline: <ul style="list-style-type: none">• Team leader - more than 5 years - 10 points; 3 to 4 years - 5 points; less than 3 years - 0 points	
3	Methodology and design - The evaluation methodology and approach to be employed including administrative aspects of the project Source: Exhibit 2 Guideline: <ul style="list-style-type: none">• An understanding of the assignment expressed in methodology and approach (10 points)• Evidence of full comprehension of processes and articulation of the tasks to administer and project manage the MTT activities and projects (15 points)• Project plan from inception phase to project closeout (15 points)	40
4	Organisation profile and proven experience of successfully completed projects of this kind and magnitude Source: Exhibits 1, 4 Guideline: Company profile and reference should demonstrate: <ul style="list-style-type: none">• Conducted administration and project management previously or similar in the past five years (5 points)• Three letters of reference in project management and administration in the past five years (15 points – for 3 letters, 10 points – 2 letters and 5 points – 1 letter)	20
	Total	100

NB: Service Providers who fail to score a minimum of 70 points out of 100 points on functionality criteria will not be eligible for further consideration.

12. Monitoring and Reporting

12.1 All monitoring of the project will be conducted by the Ministerial Task Team on a monthly basis.

12.2 The Ministerial Task Team will engage with the service provider to facilitate the smooth implementation of the project and to ensure that the objectives of the project are met.

12.3 Project Reports and invoices will be submitted to the Ministerial Task Team to confirm and approve deliverable to the satisfaction of the MTT, whereafter, it will be



submitted to the Executive Officer to effect the relevant payments in line with reports is processed by the NSF.

- 12.4 For each deliverable, as identified in DELIVERABLES, paragraph 5, the service provider will submit progress reports to the MTT in line with approved timeframes in the project plan. The reports should be in Ms Word and submitted electronically to the Chairperson and members as well as the project manager of the MTT.

13. Conditions of Quotations

- 13.1. Quotations will be subjected to Supply Chain Management conditions as follows:

- 13.1.1. The Preferential Procurement Policy Framework Act no.05 of 2000 will apply to this RFQ:

- 13.1.2. The NSF reserves the right to award or not to award this contract;

- 13.1.3. The NSF reserves the right not to accept the lowest cost proposal;

- 13.1.4. The NSF will enter into a formal contract with the successful service provider;

- 13.1.5. The NSF reserves the right to terminate the contract should the performance of the service provider be unsatisfactory;

- 13.1.6. The NSF has the right to visit the business premises of the service provider to verify the information provided in the tender documents but will inform the service provider in advance of such a verification visit;

- 13.1.7. It is the responsibility of prospective bidders to ensure that their bid documents are submitted electronically to rfq.nsf@dhet.gov.za or physically to NSF offices located at 178 Francis Baard Street in Pretoria before the closing time and date of the RFQ, the date for the closure of the RFQ is **12 November 2021 at 1pm**;

- 13.1.8. Proposals received after closing time and date are late and will NOT be considered;

- 13.1.9. Any change of information provided in the RFQ document that may affect delivery of services should be brought to the NSF's attention as soon as possible. Failure to comply may result in the contract being terminated;

- 13.1.10. All copyrights and intellectual property rights in respect of products developed by the service provider during the project will vest in the National Skills Fund who has the right to allow any other individual, company, agency or organisation to use or modify the product for any purpose;

- 13.1.11. The service provider must make provision on its own premises for:

- all IT equipment and software required,



- office space and facilities,
- printing, binding and related services
- Communications infrastructure and costs;

13.1.12. The Service Provider must allocate dedicated staff to the project.

14. Completion of all Documentation

14.1. Service providers are required to complete all the standard RFQ documentation attached and submitted with the technical and financial submissions and original tax clearance certificate.

15 ADDITIONAL PRESCRIPTS TO BE INCLUDED IN ALL NSF TERMS OF REFERENCES FOR TENDERS AND REQUESTS FOR QUOTATIONS

15.1 In terms of section 76(4)(c) of the Public Finance Management Act, 1999 (Act No 1 of 1999) (PFMA), the National Treasury may make regulations or issue instructions applicable to all institutions to which the PFMA applies concerning the determination of a framework for an appropriate procurement and provisioning system which is fair, equitable, transparent, competitive and cost-effective. The National Treasury subsequently issued National Treasury Instruction Note 3 of 2016/17 in terms of section 76(4)(c) of the PFMA.

15.2 In terms of paragraph 9.1 of National Treasury Instruction Note 3 of 2016/17, the Director-General of Higher Education and Training, as accounting authority of the NSF, must ensure that contracts are not varied:

15.2.1 By more than 20% or R20 million, whichever is the lowest, for construction related goods, works and services; and

15.2.2 By more than 15% or R15 million, whichever is the lowest, for all other goods and services that are not construction related.

15.2.3 In terms of the above-mentioned National Treasury Instruction Note, any other deviation in excess of the prescribed thresholds will only be allowed in exceptional cases subject to prior written approval from the National Treasury.

15.3 Once appointed, service providers shall adhere to the above-mentioned prescripts as follows:

15.3.1 Service providers shall not provide any goods and services that exceed the order amount;



15.3.2 Service providers shall refrain from providing any additional goods and services that exceed the order amount, unless prior written approval for the variation has been granted by the Director-General of Higher Education and Training, as the accounting authority of the NSF, or his / her delegated official.

15.4 NSF shall not be liable to reimburse the appointed service provider for any goods or services that exceed the order amount, including approved variations thereon.

15.5 NSF shall not be liable to reimburse the appointed service provider for any goods or services where such goods and services have been rendered prior to obtaining the order (incl. variation orders) therefore.

16 ENQUIRIES

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