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**BID NO: SCMU: 06 - 2023/24**

### REQUEST FOR BIDS

#### TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A TRACING AND TRACKING STUDY FOR THE 2020/21 – 2023/24 FINANCIAL YEARS FOR THE ETDP SETA SKILLS DEVELOPMENT PROGRAMS BENEFICIARIES

##### 1. INTRODUCTION

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

During the period 2020/21 to date, the ETDP SETA implemented several skills development interventions indicated in the table below. The interventions are meant to provide the beneficiaries with relevant skills to achieve competence in occupationally directed programmes from intermediate and high-level skills, more importantly to provide them with workplace experience for future employment.

The table below represents the break-down of estimated numbers of beneficiaries who entered and completed these interventions in the respective years:

Intervention	2020/21		2021/22		2022/23		2023/241
	Entered	Completed	Entered	Completed	Entered	Completed	Entered
Internships	3 034	4 769	865	1 343	1 505	591	800
Learnerships	-	1 642	-	873	200	-	500
WIL for TVETs	354	1 369	509	223	1 303	356	1 300
WIL for HEI's	-	-	-	-	636	636	750

The ETDP SETA will host a virtual briefing session for **BID NO: SCMU 06 - 2023/24 –Appointment of a service provider to render tracing and tracking study for the 2020/21 – 2023/24 financial years for the skills development programs beneficiaries** on **17 November 2023** at **11h00**. Interested members must please communicate their interest to join in the session, on or before **16 November 2023**. To attend and get access to the session, please email [TienieJ@etdpseta.org.za](mailto:TienieJ@etdpseta.org.za) with your Name, Surname, Company Name, Email address, and Cell phone 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 BRIEFING SESSION WILL CLOSE AT 11H15!**

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

<sup>1</sup> These are planned targets as per the 2023/24 APP.

## **2. PURPOSE AND OBJECTIVES**

### **2.1 Purpose**

The study serves to explore various trends, challenges, and outputs of the various skills development interventions implemented in the ETDP sector as identified above between 2020/21 - 2023/24 financial year. The understanding will assist in further developing a sustainable skills development intervention for the ETDP SETA which will contribute positively to the sector and thereby promote inclusive economic growth in the country.

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

Tracking and Tracing studies are by nature, designed to determine whether an intervention is achieving its objectives and assist in demonstrating the intervention's intended outcomes. This should include:

- a) Employment status (employed, self-employed and unemployed).
- b) Employment rates.
- c) Nature of employment, in terms of employment sector or types of employment (e.g., formal, or informal); tenure (Part time or full time, contract or permanent); salary level; benefits (UIF, pension, medical aid, allowances); and
- d) Further study.

### **2.2 Objective of the study**

The study should therefore address the following related objectives:

- a) To gather data about the effectiveness of the interventions indicated above. The impacts could be direct or indirect and intended or unintended.
- b) To understand the wider effects of these interventions – social, economic, and technical on individual beneficiaries.
- c) To generate evidence of key achievements and challenges to inform decision making process for senior management and accounting authority on interventions delivery mechanisms and these can be improved in the future to ensure sustainability.
- d) To determine the nature of employment of learners who received employment.
- e) To survey of the perceptions of employers on the value of learnerships, WIL and internships

### **2.3 Specific Research Questions**

The study seeks to answer the following specific questions:

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

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3. If not in employment, why?

- Are they studying full-time?
- Are they looking for employment?
- Are they ill?
- Are they looking after parents, siblings?

### **3. PROJECT SCOPE AND REQUIREMENTS**

#### **3.1 Project Scope**

3.1.1 The service provider will be required to track and trace the learners who entered and completed the interventions as indicated in the table above.

3.1.2 Activities include:

- Develop appropriate questionnaires.
- Conduct telephonic interviews based on an online questionnaire with a specified sample of learners who have entered and completed the interventions. A comprehensive database of the population of learners enrolled and completed will be provided by the ETDP SETA.
- Report on the profile of the beneficiaries which will include *inter alia*:
 

Details with respect to the characteristics of the learners including:

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

#### **3.2 Methodology and Approach**

- Make use of a quantitative (telephonic survey and an online survey) research methodology.
- The selected sample size must consist of 100% of population contactable.
- The service provider is expected to follow appropriate sampling guidelines.
- Deliver interview data in excel format.
- Deliver a report against each of the intervention based on a template provided by the SETA.

#### **3.3 Requirement of the Evaluator(s)**

The evaluation team should be comprised of the following:

- Project Manager/s – at least 5 years' relevant experience in project management and at 3 years in evaluations, plus a post graduate degree preferably a master's degree.
- Evaluation Specialist/s - at least 3 years' experience in evaluations, plus a post graduate honours degree preferably master's degree.
- Sector Specialist/s – an appropriate honours degree plus at least 3 years' experience in skills development within the education, training, and development.
- Possess the following core competencies:
  - Contextual knowledge and understanding
  - Interpersonal skills
  - Project management
  - Evaluation discipline and practice
  - Research practice
  - Report writing and communication.
  - Excellent communicating skills.

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- e. Two suitably Qualified Unemployed Young Graduates (at an Honours Level) placed on an internship programme for capacity building and experience for the duration of the contract.

**NB: CVs of the above team members must be submitted with proof of appropriate qualifications and form part of the bid evaluation criteria.**

### **3.4 Proposal Requirement**

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

- a) Understanding of the intervention to be evaluated and the TORs.
- b) Evaluation approach, design and methodology for the evaluation including literature and documentation review research strategy, design, procedures/methods, data collection, storage, processing and analysis procedures, tools, sampling, suggestions for elaboration or changes to scope & methodology as outlined in the TORs and examples of examples of evaluation questions etc.
- c) Activity based evaluation plan with clear timelines and responsibilities.
- d) Activity based budget in South African rand; including VAT as per the costing model indicated below.
- e) Proof of competence in a form of qualifications and a list of related projects undertaken in the past with contact people with contact details as references.
- f) Evaluation team structure: outlining clear roles and responsibilities.
- g) Capacity development elements.
- h) Quality assurance plan that will ensure that the process and the product will be of good quality.
- i) CVs and qualifications of all team members

## **4. SCOPE OF WORK**

### **4.1. Project Deliverables**

- a. Before drafting the inception report, the evaluator(s) will conduct a brief scoping exercise to review the state of the SETA's programme data and data systems, as well as identification of key stakeholders to both the evaluation and the underlying programmes. This scoping exercise will take a minimum of five days.
- b. The evaluator(s) will thereafter compile an inception report with a detailed evaluation plan, which is to be presented to and approved by the project task team and SETA management.
- c. The evaluator (s) will review the theories of change (ToCs) each of the interventions outlining how the programme is supposed to achieve intended results. The evaluator(s) will thereafter convene a workshop with key interventions stakeholders (to be identified by the SETA) for validation of the ToCs.
- d. Based on the reviewed ToCs, the evaluator (s) will construct result chain frameworks for the intervention, this should be used to guide the evaluation. The evaluator(s) will be expected to submit the results chain logic framework for approval by the project task team and management.
- e. Also guided by the ToCs, the evaluator(s) will formulate hypotheses to be tested by the evaluation study.
- f. Prior to fieldwork (data collection), the evaluator(s) will submit data collection instruments for approval by the project task team.
- g. The evaluator(s) will be expected to meet regularly with the project task team for regular progress reports (the details will be discussed during the inception meeting). The minutes of these meeting shall be submitted to the SETA.

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- h. The evaluator (s) shall submit both the draft (preliminary) and final evaluation report for approval by the project task team and SETA management. The final report shall be accompanied by all necessary annexures including approved instruments, identity protected raw data etc.
- i. The evaluator (s) shall present preliminary and final reports to any fora as shall be determined between the project task team and the evaluator(s). This remains an option for the SETA for as long as the evaluation contract is still active.
- j. A metadata should accompany any datasets produced including clarification on the following:
  - o Format of the data
  - o Description of the data
  - o Data structure
  - o Variables
  - o Data quality issues
  - o Nonresponse
  - o Coding issues
  - o Derived variable

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#### **5. COSTING MODEL (PRICE SCHEDULE)**

This costing model must not be modified at all, and if retyped all line items in order as stated BELOW to be included.

<b>COSTING REQUIREMENTS</b>			
<b>NAME OF BIDDING ORGANISATION:</b>			
<b>ITEM DESCRIPTION</b>	<b>UNIT COST</b>	<b>AMOUNT</b>	<b>COMMENTS</b>
Labour (inclusive of the stipend for the two (2) interns at an Honours level for the duration of the contract (i.e., R7 500 x 12 months x two (2) interns)			
Subsistence and communication related costs			
Project Management and Overheads (25%)			
Transportation Costs			
<b>TOTAL PROJECT BUDGET</b>			
<b>DETAILED ACTIVITY BASED LABOUR BUDGET</b>			
Inception Meeting x 1			
Project Consultative meetings/sessions x 6			
Document & Literature Review			
Inception Report Writing			
Sampling and Instrument Design (Interview Schedules)			
Key Informant Interviews			
Processing and Analysis of interview findings			
Reporting Writing			
Presentation of study results			
Total Labour costs			
<b>TOTAL COSTS</b>			
<b>ALL COSTS MUST BE INCLUSIVE OF VAT</b>			

**NAME OF BIDDER:** \_\_\_\_\_

**POSITION/ ROLE:** \_\_\_\_\_

**SIGNATURE:** \_\_\_\_\_

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

#### **6. DURATION OF THE PROJECT**

It is expected that the ETDP SETA will enter into a service level agreement (SLA) with the successful bidder. **The project will run until 31 March 2024.**

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## **7. EVALUATION CRITERIA**

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**THE ETDP SETA applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2022. The evaluation will be guided by ETDP SETA procurement policy.**

**Folder A (USB) must have documents for Stage 1**

### **7.1. STAGE 1 [Folder A (USB)]**

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

The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be disqualified.

Only bids that achieved the minimum qualifying score for functionality will be evaluated further in accordance with the 80/20 preference point systems prescribed in Preferential Procurement Regulations **5 and 6**.

**The evaluation criteria for functionality will be as below:**

NO	CRITERIA	POINTS
1.	<p>1. Contactable reference and evaluation experience of the organisation: Proof of similar projects in the past five years. To submit references on the Client's letterhead and it must be signed by the referee.</p> <p><b>1.1. Contactable reference: (12)</b></p> <ul style="list-style-type: none"> <li>(a) Three (3) references on referee letterhead = <b>12 points</b></li> <li>(b) Two (2) references on referee letterhead = <b>7 points</b></li> <li>(c) One (1) reference on referee letterhead = <b>3 points</b></li> </ul> <p><b>1.2. Organisational Evaluation Experience: (12)</b></p> <ul style="list-style-type: none"> <li>• Experience of 5yrs in conducting similar (ETD) evaluations one completed project report linked to a contactable reference = <b>12 points</b></li> <li>• Experience of 3yrs in conducting similar (ETD) evaluations one completed project report linked to a contactable reference = <b>7 points</b></li> <li>• Experience of 1yr in conducting similar (ETD) evaluations one completed project report linked to a contactable reference = <b>3 points</b></li> </ul> <p><b>NB: Each reference must clearly indicate.</b></p> <ul style="list-style-type: none"> <li>▪ <b>the name of the bidder and the project</b></li> <li>▪ <b>objectives of the project (nature of the project)</b></li> <li>▪ <b>recommendation and contact details of the referee as well as proof of completed project(s) and</b></li> <li>▪ <b>must be signed.</b></li> </ul>	<b>24</b>
2.	<p>Proof of capacity of the team to conduct the study: <b>(36)</b></p> <p>Project Manager's proof of experience in project management and evaluations (provide contactable references):</p> <p><b>2.1. Experience of Project Manager for this project: (6)</b></p> <ul style="list-style-type: none"> <li>a. 5yrs or more in project management with evaluations = <b>6 points</b></li> <li>b. 3yrs. in project management with evaluations = <b>4 points</b></li> <li>c. 1yr in project management without evaluations = <b>2 points</b></li> </ul> <p><b>2.2. Qualifications of Project Manager for this project: (6)</b></p> <ul style="list-style-type: none"> <li>• Masters = <b>6 points</b></li> <li>• Honours Degree = <b>4 points</b></li> </ul> <p>Evaluation Specialist' proof of experience in successfully conducting similar projects (provide contactable references):</p> <p><b>2.3. Experience of the Evaluation Specialist for this project: (6)</b></p> <ul style="list-style-type: none"> <li>a. 3yrs or more in evaluations = <b>6 points</b></li> <li>b. 2yrs in evaluations = <b>4 points</b></li> <li>c. 1yr in evaluations = <b>2 points</b></li> </ul> <p><b>2.4. Qualifications of Evaluation Specialist: (6)</b></p> <ul style="list-style-type: none"> <li>a. Masters = <b>6 points</b></li> </ul>	<b>36</b>

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	<p>b. Honours Degree = <b>4 points</b></p> <p>Sector Specialist' proof of experience in skills development in ETD sector (provide contactable references):</p> <p>2.5. Experience of the Sector Specialist for this project: <b>(6)</b></p> <ul style="list-style-type: none"> <li>a. 3yrs or more in skills development in ETD = <b>6 points</b></li> <li>b. 2yrs in skills development in ETD = <b>4 points</b></li> <li>c. 1yr in skills development in ETD = <b>2 points</b></li> </ul> <p>2.6. Qualifications of the Sector Specialist for this project: <b>(6)</b></p> <ul style="list-style-type: none"> <li>a. Honours' Degree = <b>6 points</b></li> <li>b. First Degree = <b>4 points</b></li> </ul>	
<b>3.</b>	<p>Research Project Plan: <b>40</b></p> <p>The following should be included:</p> <ul style="list-style-type: none"> <li>1. Research methodology, detailed research methods /milestones</li> <li>2. Allocation of resources and tools</li> <li>3. Timelines (within the prescribed period – end March 2023)</li> <li>4. Key deliverables including consultation sessions and meetings</li> <li>5. Additional value add</li> </ul> <p>- Five of the above-mentioned deliverables of the plan = <b>40 points</b></p> <p>- Only 1-4 of the above-mentioned deliverables of the plan = <b>30 points</b></p> <p>- Only 1-3 of the above-mentioned deliverables of the plan = <b>20 points</b></p> <p>- Only 1-2 of the above-mentioned deliverables of the plan = <b>10 points</b></p>	<b>40</b>
<b>TOTAL</b>		<b>100</b>

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

**Points will be awarded on a sliding scale.**

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

## **7.2. STAGE 2 [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. Declaration of Interest – **SBD 4 (New)**
- e. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 - **SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals.**
- f. B-BBEE certificate or affidavit (**If claiming preferential points**) – **this will be used to verify points to be allocated for specific goals.**

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

✓ Price	<b>80</b>
✓ Allocation of specific goals	<b>20</b>

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

#### **8. BID CONDITIONS**

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserves the right to negotiate the bidder's price.
3. ETDP SETA reserves the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned **will NOT** be accepted.
5. Bidders must submit a valid certified B-BBEE Certificate from SANAS Accredited Verification Agency or issued by Companies and Intellectual Property Commission (**CIPC**) or a signed Sworn Affidavit for allocation of points for specific goals.
6. Specific goals shall not be allocated where supportive documents as stated in the bid documents are not provided as stated in the bid document.
7. Bids submitted are to hold good for a period of **90 days**.
8. Companies who bid as a joint venture must submit a **consolidated B-BBEE Verification certificate prepared for this bid only**, from **SANAS Accredited Verification Agency** in order to be eligible for empowerment points.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that points for specific goals for B-BBEE status level of contribution are not claimed.
10. Deregistered and block-listed 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.
11. All suppliers must be registered on the Central Supplier Database. No bid shall be awarded to any supplier that is not registered on the Central Supplier Database.
12. Companies that are in the process of de-registration in the CIPC will not be considered.
13. The ETDP SETA remains the sole owner and custodian of all content, material, or any other form of development. No information of or on behalf of the ETDP SETA may be shared, during the duration or after the closing period of the project. It remains the responsibility of the appointed service provider to hand over all material to the ETDP SETA. Should a service provider wish to have the ETDP SETA as a referral, permission for this must be sought.

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#### **9. BID DOCUMENTS/PROPOSAL PACKS**

Bid documents for participation **must** be downloaded from the ETDP SETA website: [www.etdpseta.org.za](http://www.etdpseta.org.za), Main Menu > Supply Chain Management > Open Tenders as from **12h00 on 9 November 2023**.

Bidders must submit technical and financial proposals in **one (1) USB** clearly marked "**Folder A-Technical Proposal**" and "**Folder B- Financial Proposal**".

**Folder B - (Financial Proposal)** 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 prior to the award*", Invitation to Bid - SBD1, Declaration of Interest – SBD 4 (New), Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 -SBD 6.1 (*If claiming preferential points) - this will be used to verify points to be allocated for specific goals* and B-BBEE certificate or sworn affidavit (*If claiming preferential points) – this will be used to verify points to be allocated for specific goals*).

*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 (**completed in [one (1) USB]**) must be courier or hand 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 1 December 2023**.

**No late submission will be accepted!**

#### **10. CLOSING DATE**

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 1 December 2023**.

#### **11. 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 Manager: Email: [Tenderers@etdpseta.org.za](mailto:Tenderers@etdpseta.org.za)

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

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**ANNEXURE A**

Bidders are required to provide references for Project Manager and Technical lead. Failure to provide references will lead to disqualification:

**1. PROJECT MANAGER/LEADER EXPERIENCE**

Name of Project Manager/leader: \_\_\_\_\_

Project/Company name	Position/Role	Responsibilities	Start date	End date	Reference (Name & Surname)	Reference (Position)	Reference (Contact details)

**2. RELEVANT EXPERIENCE OF EVALUATION SPECIALIST**

Name of the evaluation specialist: \_\_\_\_\_

Project/Company name	Position/Role	Responsibilities	Start date	End date	Reference (Name & Surname)	Reference (Position)	Reference (Contact details)

**3. RELEVANT EXPERIENCE OF THE SECTOR SPECIALIST**

Name of the Sector specialist: \_\_\_\_\_

Project/Company name	Position/Role	Responsibilities	Start date	End date	Reference (Name & Surname)	Reference (Position)	Reference (Contact details)

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