TERMS OF REFERENCE

For the provision of technical services to the Jobs Fund by serving on the Technical Evaluation Committee (TEC)

PN558

Programme Identification

Name of Client	The Jobs Fund
Reference Number	**PN558**
Name of Sub-Project	Appointment of Technical Evaluation Committee (TEC) members (x9)
Contracting Authority	Government Technical Advisory Centre (GTAC), National Treasury
Accountable Officer	Ms. Najwah Allie-Edries
Project Purpose	Provision of technical services to the Jobs Fund by serving on the Technical Evaluation Committee

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Najwah Allie-Edries

Deputy Director General: Employment Facilitation

Date: 16 April 2025

CONTENTS

1. BACKGROUND INFORMATION 3
2. PURPOSE 4
3. TECHNICAL EXPERTISE REQUIRED 4
4. RESPONSIBILITIES AND FUNCTIONS 5
5. MEETINGS 5
6. LOGISTICS AND SCHEDULE OF THE ASSIGNMENT 5
7. SUBMISSION REQUIREMENTS 6
8. EVALUATION CRITERIA 7
9. FINANCIAL IMPLICATIONS 12
10. CONTRACTING AUTHORITY 12
11. OTHER BID CONDITIONS 12
12. BID VALIDITY PERIOD 12
13. LEGAL IMPLICATIONS 12
14. CLARIFICATIONS 12
15. COMMUNICATION 13
16. COUNTER CONDITIONS 13
17. PROHIBITION OF RESTRICTIVE PRACTICES 13
18. BENEFICIAL OWNERSHIP 13
19. SUBMISSION DETAILS 14
20. CLARIFICATIONS 15
21. NON-COMPULSORY BRIEFING SESSION 15
22. CONTACT DETAILS 15

1. BACKGROUND INFORMATION

Established in 2011, the Jobs Fund is a sub-programme (Employment Facilitation) of the National Treasury the purpose of which is to support inclusive employment growth. It is a multi-year R9 billion matching grant facility.

The objective of the Jobs Fund is to co-finance innovative public, private and non-state sector initiatives that will significantly contribute to job creation. The Jobs Fund operates on challenge fund principles as a catalyst for innovation and investment in new ways of working that directly contribute to long-term sustainable employment creation.

Globally, challenge funds have emerged as an effective and versatile financing mechanism with which to channel public money to catalyse pro-poor innovation and investment in emerging markets and to provide profitable ways of improving market access for the poor. In practice, challenge funds are highly versatile and can be deployed across a variety of contexts and sectors, targeting a range of outcomes from financial education to enterprise-linked poverty reduction and 'pro-poor' growth.

The ultimate development goal of a challenge fund is, through a finite intervention period, to stimulate a long-term change in the way that local supply chains and market systems work to overcome cost, technology, financial, etc. barriers which may have excluded poor producers and households in the past. Systemic change in the way that market systems work is typically the desired outcome of a challenge fund and is the product of a coincidence of factors (new technology, an environment conducive to investment, innovative private investors, etc.).

The Jobs Fund supports partners in piloting innovative approaches to sustainable job creation through four funding windows, namely, Enterprise Development, Support for Work-seekers, Infrastructure and Institutional Capacity Building. The Jobs Fund accepts applications from the private, public and non-state sectors during calls for proposals, and project partners are required to share both risk and costs by matching the grant allocation, generally on a ratio of 1:1.

As of 01 October 2014, the Jobs Fund was located within the Government Technical Advisory Centre (GTAC) an entity of the National Treasury that provides administrative support to the Jobs Fund.

The main objective of the Technical Evaluation Committee is to during a call for proposals to conduct initial screening and appraisal of grant applications. The assessment is made against the Jobs Fund investment criteria which include amongst others consideration of whether the application is demand-led, potential for sustainable job creation, innovation, value for money and economic sustainability of the proposal beyond the grant.

2. PURPOSE

The purpose of this Terms of Reference is to contract with a maximum of nine (9) individuals with the requisite technical expertise to independently assist the Jobs Fund-GTAC in assessing grant applications. Individuals' services will be requested based on their respective areas of expertise, and alignment will be sought with specific calls for proposals.

3. TECHNICAL EXPERTISE REQUIRED

The technical expertise required ranges across economic sectors while accommodating specific sectors that may be the focus of a funding round. Generally, the required areas of expertise include:

3.1 Areas of Expertise

i. Social Impact Investment
ii. Challenge Funds
iii. Development Finance
iv. Social Employment
v. Public Employment
vi. Workforce development and support for work seekers
vii. Youth development and employment
viii. Community development / informal economy
ix. Enterprise development
x. Development of Township and rural economies
xi. Digital Infrastructure
xii. Green economy / Just Energy Transition

3.2 Economic Sector Expertise including:

i. Agriculture
ii. Tourism
iii. Manufacturing
iv. Digital Economy
v. Social Economy
vi. Informal Economy
vii. Creative Sector
viii. Care work
ix. Construction
x. Waste Management
xi. Repair and Maintenance services

4. RESPONSIBILITIES AND FUNCTIONS

The Technical Evaluation Committee shall be responsible for the following matters:

4.1 Assessment of Funding Proposals

i. The consideration and assessment of proposals submitted to the Jobs Fund during a call for proposals, against the funding criteria of each call for proposals.
ii. Provide technical feedback on the applications presented at the committee meetings.
iii. Each TEC member is expected to provide guidance and recommendations to assist in the development of a sound proposal for submission to the Jobs Fund Investment Committee. The TEC members may also direct the Jobs Fund PMO to obtain additional information or clarification on proposals being considered, where it is warranted.
iv. Make recommendations to the Jobs Fund Investment Committee on whether to approve or not approve the application.
v. Take instruction/follow-up on requests from the Jobs Fund Investment Committee.

5. MEETINGS

5.1 Frequency and Attendance

i. The TEC shall meet as and when required:
   a) A schedule of meetings approved by the TEC will be issued to all members of the TEC for each Funding Round.
   b) Special meetings of the TEC shall be arranged by consultation between the Chairperson of the TEC and the TEC Secretariat.
   c) All TEC members should attend meetings – in person or on the specific electronic platform
   d) Members who are unable to attend shall in advance advise the TEC Secretariat.
   e) The TEC shall not be required to meet, should there not be a funding round during a particular financial year.
   f) Depending on the nature of the funding round TEC members' inputs for proposals might be solicited remotely as and when required or members may be asked to provide inputs into management appraisal meetings.

6. LOGISTICS AND SCHEDULE OF THE ASSIGNMENT

6.1 Facilities to be provided by the Service Provider

The service provider will be responsible for the following:

- IT (laptops, etc.).

- All mobile communications (voice and data)
- Meetings will either take place in a predetermined venue (Jobs Fund offices in Gauteng) or on a specific electronic platform.

6.2 Sub-Contracting

The work that the service provider will be contracted to do shall not be sub-contracted.

6.3 Time Frame

The appointment period will be for five years from the date of appointment.
The estimated time requirement during this period is calculated at fifty days (8 hours per day). Depending on the area of expertise and the respective funding rounds, TEC members' services may be utilised on a rotational basis. The Jobs Fund cannot guarantee that each member's services will be utilised for the full-time allocation as this is dependent on the funding rounds and the availability of grant funding.

One of the appointed members will be selected to serve as the *ex-officio* member of the Jobs Fund Investment Committee. This member will require the same amount of time (as mentioned above) with respect to the Jobs Fund Investment Committee's responsibilities and would, therefore be appointed for 100 days (8 hours per day).

The time allocated would be utilised as follows:

- Attendance of meetings
- Meeting preparation and review of project applications
- Provision of technical inputs
- Additional inputs for Management appraisal meetings

7. SUBMISSION REQUIREMENTS

Applicants are required to indicate the following:

1. An hourly **rate** inclusive of VAT (if applicable).
    a. An allocation for disbursement must be provided if an individual is travelling from outside Gauteng.
2. An indication if the bidder is contracting **individually or through a company.**
3. A comprehensive **CV.** CVs should reference the specific experience and expertise sought by the Jobs Fund, as stipulated in the Evaluation Criteria below;
4. **copy of highest qualification**; and
5. **Proof of membership** of a professional body (where required, e.g. admitted attorneys etc.)

6. Organisations **submitting CVs on behalf of their employees** should submit no more than five (5) CVs. If an organisation submits more than 5 CVs, only the first five CVs in the pack shall be considered for evaluation.

8. EVALUATION CRITERIA

GTAC has set minimum standards that bidders must meet to be selected as the successful bidder.

The successful bidder will be awarded the contract for the **above** duration of the service requirements and will be selected based on the following three-phase process:

8.1 Evaluation Phases/Methodology

Table 1: Evaluation Phases

Evaluation Stage	Description
Phase 1	**Administrative Compliance** A bidder is required to submit the administrative compliance documents as referred to in paragraph 8.1.1. **Mandatory Compliance – Disqualification** Failure to submit any of the required mandatory documents will lead to disqualification.
Phase 2	**Technical Evaluation: Desktop Evaluation** Bidders must submit information as per Bid Submission Requirements. The submitted technical proposal must respond to the Technical Evaluation criteria cited in these Terms of Reference. The Technical proposal will be evaluated out of 100 points with a Threshold of **70 points**. Only bidders who meet the threshold will be considered for the Specific Goals evaluation. ***Bidders must note that submission of Annexures A (CV Template), and Annexure B (Price Proposal) in the prescribed formats is recommended.***
Phase 3	**Price and Specific Goals** Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 8. Bidders must provide the required information for evaluation purposes.

It should be noted that the stages are considered to be separate processes. These three phases are mutually exclusive and will be treated as such in the appraisal.

8.1.1 Stage 1a: Administrative Compliance

During this phase, bid documents will be reviewed to determine compliance with tax matters and the Central Supplier Database (CSD) at the closing date and time of the bid. Bidders must submit all returnable documents as outlined in the table below.

Should a bidder fail to submit or fully complete the indicated SBD forms, the bidder must be requested to provide fully completed form(s) within two days from the date of notification. Failure to adhere to the notification should result in a bid being disqualified immediately after the two days have lapsed.

Table 2: Bid requirements compilation and submission:

Document to be submitted	Requirement
Electronic submission: The bid proposal to be submitted to the relevant platform before closing date and time of the bid. The folders / Files must be clearly marked and separated.	Electronic submission: Confirmation report to indicate all bid documents received on or before the closing date and time of the bid.
SBD 1- Invitation to Bid	Complete and sign the supplied pro forma document.
Central Supplier Database (CSD) Registration Report or CSD registration number or SARS pin	Bidders **must** be registered on the Central Database System (CSD) at the closing date and time of the bid.
SBD 3.3 – Pricing Schedule	Complete and sign the supplied pro forma document.
Note: A bidder who fails to complete or does not submit the SBD 3 form will be disqualified without being granted an opportunity to submit a price.	
SBD 4 - Bidder's Disclosure (Refer to note below)	Complete and sign the supplied pro forma document
Note: Bidders must submit the attached SBD 4 document. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form: - ''Person'' means a bidder or supplier or shareholder, director, trustee, partner, or member of a bidder or supplier having the controlling interest in the bidder or supplier. - ''State'' means a national or provincial department, a national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament	
SBD 6.1 - Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022	Complete and sign the supplied pro forma document. Failure to submit or fully complete SBD 6.1 will result in the bidder forfeiting points for specific goals.
Prescribed CV templates	Complete and sign the supplied pro forma template.

Tax Clearance Status

A valid tax pin / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Where consortium/joint ventures/sub-contractor is involved each party to the association must submit a separate validation of Tax status and CSD registration number.

Bidder's tax matters must be compliant at the time of award. In the case where a bidder's tax matters are non-compliant, a bidder will be given a maximum of seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

8.1.2 Stage 1b: Mandatory Compliance (Disqualification)

Bidders must submit a responsive proposal in accordance with these terms of reference. Failure to adhere to any of these requirements will result in disqualification:

a. Bidders must be registered on the Central Supplier Database (CSD) on the closing date of the Request for Bid (RFB).
b. Submission of a technical proposal is required.
c. Submission of a price/financial proposal is required as per SBD 3.3.
d. Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered. i.e., in the event that a bidder representative is in the employ of the state, such a bid proposal will not be considered.

8.1.3 Phase 2: Desktop Evaluation

In addition to the proposal, the bidder is expected to submit the following:

Table 3: Submission Requirements

No.	SUBMISSION REQUIREMENTS (non-submission will lead to disqualification)
1.	Resource Matrix, clearly showing the role and qualification of each team member for the completion of the project (this must be in the Resource Matrix template provided).
2.	Experience Matrix, clearly showing the experience of proposed individual/team members as per the stipulated requirements (this must be in the Experience template provided)

The Desktop Evaluation criteria are discussed in Table 4 below.

Each proposed individual will be evaluated independently in a case where more than 1 CV is submitted. All proposals would be evaluated on the following criteria:

Table 4: Evaluation Criteria

No.	Evaluation Criteria	Scoring Criteria	Weight
1	Qualification • Highest Qualification (in areas of commerce; law; technology; engineering or social sciences) *Where qualifications are not submitted, or qualifications are not in the relevant field as mentioned above, a score of 0 will be awarded*	5 = Post Graduate degree (NQF 8 or higher) 4 = Degree (NQF 7) 3 = National diploma (NQF 6) 2 = National certificate (NQF 5) 1 = Matric 0 = non-submission of qualifications or qualifications are not in the relevant area as specified.	20 points
2	General Experience • Number of years of experience in the following areas: ○ Assessment of development projects. ○ Use of financial instruments and financial structuring of development projects. *Applicant to clearly mark* ***"General Experience"*** *in the Experience Matrix and in the CV*	5 = > 10 years combined experience in one or more of the specific areas 4 = 8 - 9 years combined experience in one or more of the specific areas 3 = 5 - 7 years combined experience in one or more of the specific areas 2 = 2 - 4 years combined experience in one or more of the specific areas 1 = < 2 years combined experience in one or more of the specific areas 0 = No Experience	25 points
3	Technical Experience • Number of years of experience in the areas listed in section 3.1 *Applicant to clearly mark* ***"Technical Experience Criteria"*** *in the Experience Matrix and in the CV*	5 = > 10 years combined experience in one or more of the specific areas 4 = 8 - 9 years combined experience in one or more of the specific areas 3 = 5 - 7 years combined experience in one or more of the specific areas 2 = 2 - 4 years combined experience in one or more of the specific areas 1 = < 2 years combined experience in one or more of the specific areas 0 = No Experience	25 points
4	Expertise • Economic Sector Expertise in the sectors listed in section 3.2. *Applicant to clearly mark* ***"Expertise Criteria"*** *in the Experience Matrix and in the CV*	5 = > 10 years combined experience in one or more of the specific areas 4 = 8 - 9 years combined experience in one or more of the specific areas 3 = 5 - 7 years combined experience in one or more of the specific areas 2 = 2 - 4 years combined experience in one or more of the specific areas 1 = < 2 years combined experience in one or more of the specific areas 0 = No Experience	30 points
TOTAL TECHNICAL POINTS			100 Points
MINIMUM THRESHOLD			70 Points

Only bidders that meet the 70 points threshold will be considered for the Price and Specific Goals evaluation in terms of the Preferential Procurement Regulation (PPR) 2022.

8.1.4 Phase 3: Price and Specific Goals Evaluation

a. Preferential Procurement Evaluation will be based on the 80/20 principle.

b. The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for the price as allocated in the enclosed form SBD 6.1. that must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in table 5 below.

c. Submission of a price proposal is required in the proforma format. (SBD 3.3). Bidders need to provide cost per output, inclusive of VAT.

d. GTAC reserves the right to negotiate the price offer or rates with the recommended bidder(s).

Table 5: Price and Specific Goals Evaluation Criteria

Number of points allocated (80/20 system)	
Price	**80**
The specific goals allocated points in terms of this tender	**20**
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10
Women percentage of ownership: 30% and above	10
Total Points	**100**

The CSD report shall be used as evidence to confirm/award points for specific goals. It is the responsibility of the bidding entity to ensure that the information on the CSD is updated.

Table 6: Definitions

Terminology	**Definition**
"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 the Reconstruction and Development Programme as published in *Government Gazette* No. 16085 dated 23 November 1994;
Historically Disadvantaged Individual (HDI)	means a South African citizen: 1. who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) ("the interim Constitution); and/or 2. who is a female; and/or 3. who has a disability.

Terminology	Definition
	provided that a person who obtained South African citizenship on or after the coming to effect of the Interim Constitution, is deemed not to be an HDI;

9. FINANCIAL IMPLICATIONS

The service provider may be required to attend meetings at Jobs Fund offices in Gauteng when deemed necessary by the Jobs Fund, which will not form part of travel disbursements. The quotation should be inclusive of all travel-related costs.

All quotations would need to specify the deliverables to be completed, time allocated to each deliverable and cost implications (please include price proposal as per SBD 3.3).

10. CONTRACTING AUTHORITY

The Contracting Authority will be the Government Technical Advisory Centre (GTAC).

11. OTHER BID CONDITIONS

Prior to the appointment, the recommended service provider may be required to submit additional supporting documentation.

GTAC reserves the right to negotiate the final offer with the recommended bidder before the award.

12. BID VALIDITY PERIOD

The bid will be valid for ninety (90) days from the closing date of the bid.

13. LEGAL IMPLICATIONS

The successful service provider must be prepared to enter into a service-level agreement with GTAC.

14. CLARIFICATIONS

Requests for clarification must be made in writing by e-mail. Telephonic enquiries for clarification will not be accepted.

Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.

15. COMMUNICATION

Professional Services Procurement (PSP) within GTAC will communicate with bidders where bid clarity is sought, to obtain information or to extend the validity period.

Any communication by the bidder (either by facsimile, letter, electronic mail or any other form of correspondence) to any government official, representative, or a person acting in an advisory capacity for the National Treasury in respect of this bid between the closing date and the award of the bid is prohibited.

16. COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the Information to bid by bidders will result in invalidation of such bids.

17. PROHIBITION OF RESTRICTIVE PRACTICES

In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/ are or a contractor(s) was/were involved in:

a. Directly or indirectly fixing a purchase or selling price or any other trading condition.
b. Dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
c. Collusive bidding.
d. If a bidder(s) or contractor(s), in the judgment of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

18. BENEFICIAL OWNERSHIP

The bidder/s are required to provide the below information for transparency.

a. A beneficial owner of a company is an individual who, directly or indirectly, ultimately owns that company or exercises effective control over that company.

b. Companies are required to keep a register of their beneficial owners and to provide this information to the Companies and Intellectual Property Commission (CIPC). The CIPC maintains a central register of beneficial ownership information.

c. The beneficial ownership regime in South Africa is intended to improve transparency and accountability in the corporate sector. It is also intended to help to prevent money laundering and terrorist financing.

d. Companies are required to keep a register of their beneficial owners and must disclose in their bids the following information as provided for in their register for information of each beneficial owner:

- Name
- Date of birth
- Identity number or passport number
- Residential address
- Occupation
- Nature and extent of control over the company

19. SUBMISSION DETAILS

Bidders are to note that only electronic submission is allowed for this bid using the GTAC Vendor Portal, available on the link provided below:

https://vendorportal.gtac.gov.za/

Bidders are required to first register on the GTAC Vendor Portal and then login to the portal to access the tender.

The registration process involves the following steps:

a) Register as a portal user. This is the process of creating a user account on the vendor portal. This will allow the user to view and respond to tenders.

b) Register your supplier details. Registering your company details will allow you as the supplier to upload relevant information and documents. Supplier details must be captured in order to receive a vendor or supplier number, and will then be eligible to respond to tenders.

To respond to this tender, suppliers should login to the portal and navigate to the tender menu then select “Formal” then click on “Current”. This will provide a list of the available tenders.

Bidders can select this tender (reference TEN0000000039) to start the submission process.

The capturing process is in the form of a wizard, with the system guiding you through each step. Once all the required information is completed, remember to submit your bid. Only submitted bids will be eligible for the award.

NB: Do not submit hardcopy bids to GTAC or the Tender Information Centre (TIC). Submissions received after the closing date and time will not be accepted.

20. CLARIFICATIONS

c) Requests for clarification must be made in writing by e-mail to psp@gtac.gov.za.
d) Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.
e) Telephonic enquiries for clarification will not be accepted. Bidders must reduce all enquiries to writing.

21. NON-COMPULSORY BRIEFING SESSION

A non-compulsory briefing session will be held at a specified date and time as indicated in the cover/invitation letter of this bid.

22. CONTACT DETAILS

Professional Services Procurement,

3rd Floor at GTAC: room GL03.44

Private Bag X 115, Pretoria, 0001

Physical address: GTAC, 40 Madiba Street (Vermeulen), Pretoria.0001 For

any enquiries, email: psp@gtac.gov.za