

(“The DSTI”)

**TERMS OF REFERENCE**

**APPOINTMENT OF A PANEL OF HEALTH AND SAFETY TRAININGS FOR THE DEPARTMENT OF SCIENCE, TECHNOLOGY AND INNOVATION**

**PERIOD: 3 YEARS**

**N.B. : *By providing us with your Personal Information, you consent to the DSTI processing your Personal Information, which the DSTI undertakes to process strictly in accordance with the section 18 informed consent document.***

**1 BACKGROUND**

1.1 The Department of Science, Technology and Innovation (DSTI) is situated at the

Council for Scientific and Industrial Research (CSIR) Campus in building 53

Meiring Naude Road, Brummeria. In terms of the Occupational Health and Safety Act (OHSA) DSTI as the employer must provide statutory training in line with the departmental Occupational Health and Safety requirements.

1.2 The provision of OHS training is mandatory for both private and public sector in South Africa. Noncompliance can result in penalties, fines and even imprisonment, which involves costs that are far greater than the costs involved with providing training. It is also the best practice and forms part of safe working methods and procedures.

1.3 Based on the Occupational health and Safety Act requirements, DSTI needs to focus on training as per the approved training matrix (Annexure A) to ensure compliance standards are met. This includes the mandatory statutory training for employees appointed as the OHS Act and the training required for relevant stakeholders that work to ensure OHS Compliance.

1.4 The DSTI has an approved Training Matrix (2025-2029), in line with the approved

OHS strategy.

1.5 Despite the critical importance of Occupational Health and Safety (OHS) in ensuring workers’ well-being and compliance with regulatory standards, DSTI faces significant challenges in delivering effective OHS training. These challenges include low employee engagement, inconsistent delivery methods, lack of up-to- date content, and limited assessment of training outcomes. As a result, employees may not fully understand safety protocols, leading to increased workplace accidents, reduced productivity, legal liabilities, and reputational damage.

1.6 DSTI has made several attempts through normal SCM processes to acquire service providers to provide OHS training services. Through all acquisitions of

2024/25 financial year no service provider responded, hence the approach of finding the panel of service providers.

**2 PURPOSE**

2.1 The purpose and objective of these Terms of Reference is to appoint a panel of suitably qualified service providers with the requisite expertise, capacity, and competence to provide OHS training to DSTI employees for a period of three years.

**3 SPECIFICATION**

The appointed service provider will be expected to carry out the condition assessment as follows: -

3.1 Provide one or more of the listed OHS training.

|  |  |  |
| --- | --- | --- |
| Targeted training | Quantity / Targeted group | Targeted dates |
| Fire Fighting | Targeted 6 appointed fire marshals | March 2025 |
| Fire Fighting | Targeted 6 appointed fire marshals | March 2029 |
| First Aider | 10 appointed First Aiders | March 2027 |
| First Aider | 5 appointed First Aiders | March 2029 |
| OHS Audit | 03 Employees SPD | March 2025 |
| Health and Safety  Representative | 05 Employees HSW representatives | March 2026 |
| Health and Safety  Representative | 05 Employees HSW representatives | March 2028 |
| Introduction to Occupational  Health and Safety Act | 02 Employees SPD | March 2025 |
| Advanced Occupational  Health and Safety Act | 02 Employees SPD | March 2026 |
| Hazard Identification and  Risk assessment | 03 Employees Facilities | March 2026 |
| Ergonomics training | 02 Employees SPD | March 2026 |
| Legal liability | 1 x OHWSC chairperson | December 2024 |
| Legal Liability | 4 x Directors  Auxiliary Services | December 2024 |

|  |  |  |
| --- | --- | --- |
|  | Communications  Kirmo  Special programme |  |
| Lighting/illumination  assessment | 05 SPD and Auxiliary services | March 2026 |
| Incident investigators | 02 SPD | March 2026 |

3.2 Provide training arising out of OHS audit or OHS risk assessment.

3.3 Share the content of the course prior to providing training.

3.4 Provide certificate for each course in line with SAQA requirements.

**4. INFORMATION TO BE FURNISHED BY RESPONDENTS IN THEIR PROPOSAL**

4.1 All prices quoted must include VAT and should be linked with specific tasks to be undertaken.

4.2 A service provider should comply with the specification.

4.3 The service provider shall be expected to provide a quotation based on the table below (*table to be placed on own letterhead and not to be completed on this form*):

|  |  |  |  |
| --- | --- | --- | --- |
| **DESCRIPTION** | **QUANTITY** | **RATE PER**  **DAY/HOUR** | **TOTAL** |
| Cost for providing of Training  course per individual  (List of training as indicated in table 3 above or as per employer needs) | 1 | R | R |
| Cost for training manuals | 1 | R | R |
| Cost of training venue where  applicable | 1 | R | R |

|  |  |  |  |
| --- | --- | --- | --- |
| Cost of meals per individual  where applicable | 1 | R | R |
| Cost for travelling and  accommodation of facilitators  (where applicable) | 1 |  |  |
| TOTAL (excluding vat) |  | R | R |
| Vat @ 15% |  | R | R |
| TOTAL (including vat) |  | R | R |

4.4 The Service provider will be required to provide the services during working hours.

**5. EVALUATION OF PROPOSALS**

5.1 The evaluation process will comprise of the following phases:

a) Screening for Compliance. b) Functional Evaluation; and

c) Price and Specific Goals Evaluation.

**5.2 Screening for Compliance**

During this phase, a short list will be established, and the shortlisted service providers will be evaluated further. **Service providers must meet all the below requirements to proceed further to functional evaluation**; *failure to submit the following will result in disqualification:*

a. Proof of registration to the Central Supplier Database (CSD) held by National

Treasury.

b. Compliant tax matters as per CSD or SARS e-filling.

c. Completed and signed Standard Bidding Document (SBD forms): SBD 1, SBD

4 and SBD 6.1.

d. Submit a certified B-BBEE certificate or Sworn Affidavit, failure to submit will not invalid your proposal but will score 0 points for specific goals.

e. A bid that fails to meet any pre-qualifying criteria, specifications/scope of work, terms and conditions stipulated in the tender documents is an unacceptable tender and will be disqualified.

f. Detailed company profile, which clearly spells out the relevant experience, knowledge and accreditation of the company as well as directorship.

g. Recommendation letters (reference letters) from current or past clients. These letters must be in the clients’ letterhead and must indicate the (i) type of OHS training provided, when and where it was provided, (ii) duration of the course, (iii) number of trainees who attended the course and (iv) the type certification provided (certificate of competence or competency certificate).

h. **Proof of accreditation with the relevant training SETA, QCTO and**

**Department of Employment and Labour**.

i. Proof of corporate membership with SAIOSH (South African Institute of

Occupational Safety and Health.

j. Proof of relevant accreditation for the facilitator- (Provide detailed CV

qualifications and accreditation certificates for facilitators.)

k. Detailed company profile that outlines the years of experience in providing the services required herein. ***PART A – attached hereto must also be completed and submitted with proposals.***

l. Methodology on how training will be provided.

m. Key personnel to be dedicated to facilitating the training must have at least 3 years’ experience of facilitating ohs training. CVs of key personnel who will be facilitating the required training must be attached, accompanied by certified copies of qualifications (not older than 3 months).

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**5.3 Functionality Evaluation**

a) Service providers’ responses will be evaluated for functionality in this stage, based on achieving a minimum score of fifty percent (60%).

b) The DSTI panel members will individually evaluate the responses received against the following criteria as set out below:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **FUNCTIONALITY EVALUATION** | | | | | | |
| **Rating**: 1 = Poor 2 = Average 3 = Good 4 = Very good 5 = Excellent | | | | | | |
| **CRITERIA** | | | | | | **WEIGHTS** |
| **1. Company Experience in one or more of the listed trainings.**  Added to the experience outlined in the company profile, bidders must demonstrate the company’s experience by providing at least 5 signed reference letters on the client’s company letterhead where OHS training was provided. The reference letters must not be older than five (5) years and must have dates and the course name as well as contactable references. **PART A** attached hereto must also be completed and submitted by the service provider | | | | | | 15 |
|  | 0-1 year | 2-3 years | 4-5 years | 6-7 years | 8 and above |
| **1** | **2** | **3** | **4** | **5** |
| 1 relevant signed  reference  letter on company letterhead | 2 relevant signed  reference  letters on company letterhead | 3 relevant signed  reference  letters on company letterhead | 4 relevant signed  reference  letters on company letterhead | 5 relevant signed  reference  letters on company letterhead | 15 |
| **1** | **2** | **3** | **4** | **5** |
| **2. Experience and Capacity of Key Staff in one or more of the listed trainings.**  Provide a list of key staff dedicated to this project (facilitators). They must each have at least 3 years’ relevant experience, relevant training minimum NQF 5 level and all other relevant OHS and facilitation certificates. Proof of relevant accreditation as outlined in 5.1.2 above.  The above must be supported by the CV and the certified copies of qualification and accreditation certificates for each facilitator. | | | | | | 30 |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **CRITERIA** | | | | | | **WEIGHTS** |
|  | No experience | 1 year experience,  relevant  qualification s and  accreditatio  n attached | 2 years’  experience, relevant qualifications and accreditation attached | 3 years’  experienc e relevant qualificatio ns and accreditati on attached | 4 years’  experience relevant qualifications and accreditation attached, |  |
| **1** | **2** | **3** | **4** | **5** |
| **3. Methodology.**  Provide a detailed methodology that outlines:  • Methods to be used on physical training.  • Training methods on online courses.  • For physical training, include the types/list of venues to be used. | | | | | | 30 |
|  | Methodology not submitted | Methodology submitted but not clear | Clear methodology submitted –  with training  methods for both physical and online courses. Physical training  venues not clearly specified. | Clear methodolog y submitted  –with  training methods for both physical  and online courses. Types of venues for physical trainings  are listed/provi ded | Clear methodology submitted –  with training  methods for both physical and online courses.  Types of venues for physical trainings are listed/provided  . Methodology used for both physical and online trainings are interactive |
| **1** | **2** | **3** | **4** | **5** |
| **4. Course content and customization**  The service provider must provide the comprehensive curriculum covering the risks and hazards in the workplace and/or relevant and recent information on the subject.  • Provide the sample of content to be covered.  • Type of study material for each course, when presented physical or online  • Customize the content based on the government/ DSTI roles and workplace environment | | | | | | 10 |
|  | Course  content not provided | Course content provided but not relevant  or not  enough. | Detailed  course content and relevant samples provided.  Study material for both online | Detailed course content and relevant  samples  provided. Course | Detailed  course content and relevant samples provided. Course  content |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **CRITERIA** | | | | | | **WEIGHTS** |
|  |  |  | and physical training indicated. | content customised to fit government  /DSTI  working environmen t. Study material for both online and  physical training indicated | customised to fit government/D STI working  environment.  Examples relevant to DSTI/governm ent working environment. Study material for both online and physical training indicated |  |
| **1** | **2** | **3** | **4** | **5** |
| **TOTAL SCORE** | | | | | | **100** |
| **MINIMUM THRESHOLD SCORE** | | | | | | **60** |

c) Service Providers must take note that any proposal not meeting a minimum score of 60 percent on functional proposal will be disqualified and will not be considered for the next Phase.

d) The following rating values for evaluation will be used:

i. Each panel member will rate each individual criterion on the score sheets as indicated for each phase, using the following scale:

|  |  |
| --- | --- |
| **Value** | **Description** |
| 5 – Excellent | Exceeds the functionality requirements |
| 4 – Very Good | Above average compliance to the requirements |
| 3 – Good | Satisfactory and meets the requirements |
| 2 – Average | Partial compliance to the requirements |
| 1 – Poor | Unacceptable, does not meet set criteria |

ii. The value scored for each criterion will be multiplied with the specified weighting for the relevant criterion to obtain the marks scored for each criterion. These marks will be added and expressed as a fraction of the best possible score for all criteria.

iii. The scores will be converted to a percentage and **ONLY** service providers that have met or exceeded the minimum threshold for a phase will be evaluated in terms of the next phase.

iv. Service providers must, as part of their bid documents, submit supporting documentation for all technical requirements. The panel responsible for scoring the respective bids will evaluate and score all bids based on their submissions and the information provided.

v. Service providers will not rate themselves but need to ensure that all information is supplied as required. The DSTI panel members will evaluate and score all responsive bids and will verify all documents submitted by the service providers.

**5.4 Price and Specific Goals Evaluation**

5.4.1 Quotes will be sourced on a rotational basis using the 80/20 Preferential Point

System.

5.4.2 Price inclusive of VAT will be evaluated as indicated below.

a) In terms of regulation 4 of the Preferential Procurement Regulations, 2022 pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act

5 of 2000), responsive bids will be adjudicated by the DSTI on the 80/20 preference point system in terms of which points are awarded to service providers on the basis of:

- The bid price (maximum 80 points)

- Specific Goals mentioned below in Table1 (maximum 20 points)

Service providers can only claim specific goal credentials, by providing a valid certified BBBEE certificate or Sworn Affidavit.

b) The following formula will be used to calculate the points for price in respect

of service providers with a rand value of up to R50 000 000.00:

Ps = 80 1 −



*Pt* − *P* min 



 *P* min 

Where

*Ps = Points scored for price of tender under consideration; Pt = Price of tender under consideration;*

*Pmin = Price of lowest acceptable tender.*

c) A maximum of 20 points will be awarded to a tenderer for the specific goal specified for the tender, as per the table below:

Table 1 – Specific goals

|  |  |
| --- | --- |
| **The specific goals allocated points in terms of this tender:** | **Number of points allocated (80/20 system)** |
| EMEs and QSEs |  |
| Companies owned by black people | 5 |
| Companies owned by women | 5 |
| Companies owned by youth | 5 |
| Companies owned by people with disabilities | 5 |
| Companies owned by black people living in rural or underdeveloped areas |  |
| Companies owned by black people living in townships |  |

i. A bidder must submit proof of its Specific goals’ status and claim points on

Standard Bidding Document SBD6.1.

ii. Bidder to claim points for their specific goal(s) ownership as follows:

a) Points allocated for EME or QSE as follows:

i. EME: 100% of points allocated and ii. QSE: 50% of points allocated.

b) The formula for the calculation of specific goals will be as follows:

(Share percentage x points allocated for specific goal) Max percentage of ownership (100%)

➢ Formula to be used for each specific goal you claim points for.

➢ Points for each specific goal claimed will be calculated together to get a final score out of 20 points.

iii. A bidder failing to submit proof of Specific goals’ status or failing to meet the Specific goals, may not be disqualified, but (a) may only score points out of 80 for price; and (b) score 0 points out of 20 for Specific goals.

iv. A bidder may not be awarded points for specific goals status if the bid documents indicate that the bidder intends subcontracting more than 25% of the value of the contract to any person or company that does not have the points that the bidder qualifies for (at least), unless the intended subcontractor is an EME that has the capability to execute the subcontract.

v. The points scored by a bidder for Specific goals in accordance with the preceding paragraphs 6.4(c) must be added to the points scored for price under paragraph 6.4(b).

vi. The points scored must be rounded off to the nearest two decimal places. vii. If the price offered by a tenderer scoring the highest points is not market-

related, the Department may not award the bid to that tenderer.

➢ The Department may negotiate a market-related price with the tenderer scoring the highest points or cancel the tender.

➢ If the tenderer does not agree to a market-related price, the

Department may negotiate a market-related price with the tenderer scoring the second highest points or cancel the tender.

➢ If the tenderer scoring the second highest points does not agree to a

market-related price, the Department may negotiate a market-related price with the tenderer scoring the third highest points or cancel the tender.

➢ If a market-related price is not agreed in all the afore-mentioned

respects, the Department must cancel the tender.

viii. In the event that two or more tenderers score an equal total number of points, (1) the contract must be awarded to the tenderer that scored the highest points for specific goals. (2) If two or more tenderers score equal total points in all respects, the award must be decided by the drawing of lots.

ix. A contract may, on reasonable and justifiable grounds, be awarded to a bid that did not score the highest number of points.

**NB: All costs that the service provider may incur due to the preparation of the project for the DSTI shall be the sole responsibility of the service provider.**

**6. AWARDING OF THE BID**

6.1 The successful service provider will work in close collaboration with the DSTI team so as to ensure that the objectives of the Department are accommodated.

6.2 The successful service providers will be required to enter into a formal contract with

DSTI for a period of 36 months.

**7. SUBMISSION OF PROPOSALS**

7.1 The deadline for the proposal is **28 July 2025 at 11:00.**

7.2 The proposals should be sent to the relevant SCM Practitioner who sourced quotations using the details provided through the email used to source or [acquisition@dsti.gov.za.](mailto:acquisition@dsti.gov.za)

**8. CONTACT PERSONS**

Enquiries relating to this request should be addressed to the SCM Practitioner who sourced quotations

**PART A: CLIENT BASE**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Name of client / organization where contract is being executed/was executed** | | **Description of Contract Services** | **Physical Address of the Client/ organization** | **Contact persons and telephone numbers of your client** | **Contract period (indicate start and end dates)** e.g. 1 April  2012 to 31  March 2015 | **Is the contract Current or Past?** (please indicate accordingly) |
| 1. |  |  |  |  |  |  |
| 2. |  |  |  |  |  |  |
| 3. |  |  |  |  |  |  |
| 4. |  |  |  |  |  |  |
| 5. |  |  |  |  |  |  |
| 6. |  |  |  |  |  |  |
| 7. |  |  |  |  |  |  |
| 8. |  |  |  |  |  |  |
| 9. |  |  |  |  |  |  |
| 10. |  |  |  |  |  |  |

**NB: DSTI reserves the right to verify the contents of this list directly with the bidders’ clients and also**

**conduct site inspections**