

## TERMS OF REFERENCE (TOR)

### APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO DEVELOP A PROVINCIAL SECTOR SKILLS PLAN (PSSP) 2023-2024

**Board members:** Mr Thulani Tshefuta (Chairperson) | Ms Christelene Brink | Mr Lewis Nzimande | Ms Gaolape Anastacia Seokolo  
Mr Nkojane Nelson Maesela | Mr Patrick Babsy Makhafane | Ms Nolukhanyo Amanda Kelengeshe | Ms Violet Matshidza  
Ms Tampane Molefe-Sefanyetso | Mr Patrick Boitumelo Moopelwa | Ms Linda Dlodla | Ms Nelisiwe Nzimande  
Ms Nomabandla Silinyana | Mr Marcus Ramakgale

**CEO:** Ms Bontle Lerumo

## **1. INTRODUCTION AND BACKGROUND**

1.1. The PSETA is a statutory body established through the Skills Development Act of 1998.

It is a schedule 3(a) listed public entity in terms of the Public Finance Management Act (PFMA) (Act 1 of 1999 as amended) and is accountable to the National Department of Higher Education and Training (DHET). PSETA conducts its activities within the following four sub-sectors:

- i) National Departments
- ii) Provincial Departments
- iii) Legislative Sub-sector
- iv) Public Entities

1.2. Within these sub-sectors, PSETA's responsibility is to:

- a) Develop a Sector Skills Plan (SSP) within the framework of the National Skills Development (NSDP);
- b) Implement the SSP;
- c) Support and administer Learning programmes;
- d) Conduct quality assurance on learning in line with Quality Council for Trades and Occupations (QCTO) requirements;
- e) Disburse levies collected from levy paying employers in our sub-sectors in terms of the Skills Development Levies Act;
- f) Support the implementation of the National Qualifications Framework (NQF);
- g) Quality assure learning interventions;
- h) Report to the Minister of Higher Education and Training (HET) and the South African Qualifications Authority (SAQA).

1.3. The PSETA Sector Skills Plan (SSP) is a framework within which PSETA identifies key priorities and critical skills development trends, objectives, and priority areas, which provide for a sector profile and analysis of the demand for, and supply of skills in the Public Service sector.

## **2. OBJECTIVES OF THE ASSIGNMENT**

2.1. The purpose of this project is to obtain the services of a suitable service provider to develop a Provincial Sector Skills Plan (PSSP) focusing on the skills demand and supply of the Province Public Service sector, based on credible, up-to-date researched evidence collected by the service provider.

## **3. SCOPE OF WORK**

3.1. The service provider will research and prepare a Provincial Sector Skills Plan (PSSP), covering provincial government and state entities within the province, in line with the Department of Higher Education and Training's (DHET) latest Sector Skills Plan (SSP) Framework as a guide.

3.2. The PSSP must:

- adhere to all DHET Sector Skills Plan guidelines, frameworks, and all related requirements; be drafted taking the research done within the sector as a whole into account;
- be triangulated with other reliable, verifiable, valid and relevant Provincial data sets as a basis; and must be consistent in terms of content and statistics focusing on, but not limited to, the following:

### **3.2.1. Provincial Sector Profile**

- i. The profile of the identified Province is accurately captured in all respects and updated and must include Standard Industrial Classification (SIC) Codes and coverage thereof.
- ii. The Province's economic performance, employer and employee profiles are analytically discussed.
- iii. COVID-19 and its impact on the Province is analysed and discussed.
- iv. Trends and patterns in the Province are captured and discussed.

### **3.2.2. Key Skills Issues**

- i. Choice of change drivers in the Province are directly related to skills-related demand and supply considerations.
- ii. Key skills issues of the Province are established using participative research methods.
- iii. COVID-19, emerging trends, future of work, etc and its influence on the Province is discussed.
- iv. There is a minimum of five key skills issues.

### **3.2.3. Extent of Skills Mismatch**

- i. Stakeholder profile ie. of provincial government and state entities within the Province;
- ii. There is an accurate provincial Sectoral Priority Occupations and Interventions List (SPOI) with supporting evidence for each occupation identified in the list;
- iii. There is critical analysis of the state of education and training in the Province;
- iv. There is accurate identification of skills gaps with supporting evidence;
- v. An analysis of the skills demand, skills supply and skills gaps in the Province;
- vi. Occupational mismatches are identified with supporting evidence.

### **3.2.4. Sector Partnerships**

- i. A critical analysis of potential/ identified Provincial SETA partnerships demonstrating an understanding of issues
- ii. Focus on what has been achieved through partnerships
- iii. Provide examples of successful Post-School Education and Training (PSET) partnerships in the Province that the PSETA may pursue
- iv. Strengthen/develop an effective Public Private Partnership (PPP) model for the Province based on analyses and recommendations made.

### **3.2.5. Provincial Monitoring and Evaluation**

- i. Insight into the Province's Monitoring and Evaluation approach related to skills development.

### **3.2.6. Strategic Skills Priority Actions**

- i. Insight and analysis of findings from previous chapters are translated into skills priority Actions.
- ii. Major skills priorities are identified and discussed.
- iii. In addition to all of the above, the impact of COVID-19, ERRP implementation and related challenges must be factored into the PSSP, how such considerations influence and shape the Province from a skills planning perspective, and how the PSETA is to address issues emanating from this major challenge in the form of Provincial strategic skills priority actions.

3.3. The Province will be selected by the PSETA and will be communicated to the successful service provider upon appointment.

## **4. METHODOLOGY**

The service provider will be expected to design and apply tools and methodologies which will produce valid and reliable data results for use towards effectively achieving the scope of work indicated. This will include, but may not be limited to, literature reviews, primary and secondary data collection and analysis for quantitative and qualitative (i.e. mixed) methodology, etc.

Recommendations for research work to be undertaken is listed, but not limited to the following: service provider must propose a methodological approach which will be subject to review by the PSETA.

- 4.1. Defining and describing the Provincial Public Service sector: This will involve mainly desktop research to produce a clear definition of the Provincial administration, including all sub-sectors. Furthermore, it is important to define cross-sectoral relationships with other sectors.
- 4.2. Review the sector in terms of key Provincial policies and strategies, growth, equity, and other measures that locate the PSETA sector in the current Provincial Growth and Development Strategy context.
- 4.3. Conduct an analysis of employment trends in the Province using desktop research and analysis of data such as from relevant sources.
- 4.4. Produce a Provincial analysis, examining the linkages with other sectors, alignment to national strategies and priorities, alignment with Provincial growth and development strategies and making use of scenario thinking to project potential future scenarios for the PSETA sector.
- 4.5. Analyse Workplace Skills Plans (WSPs) and Annual Training Reports (ATRs) to be submitted by employers by 30 April each year, or as and when so advised by designated authorities.
- 4.6. Assess the transversal skill needs of the different Provincial department in addition to data cleaned from WSPs, analyse available recruitment statistics and conduct interviews with the identified department in the Province.
- 4.7. Arrange and facilitate a small number of focus groups and workshops to test findings of desk, data and field research and explore strategies for expanding the sector, improving labour absorption levels, and supporting job creation in the Province.
- 4.8. Conduct transversal skills supply analysis based on current programmes available to meet the demands of the sector.
- 4.9. Facilitate consultative processes within the PSETA to validate the PSSP with stakeholders, including presentation, preparation and facilitation of discussions where required.
- 4.10. Review and prepare the final PSSP for submission based on internal and external stakeholder inputs.

## 5. DELIVERABLES

The appointed service provider is expected to deliver the following in line with the Service Level Agreement (SLA) to be entered into with the PSETA:

The key deliverables are as follows:

- 5.1. All the assignment reports must be of high quality.
- 5.2. A project plan with the reflection on the understanding of the scope of work within seven (7) working days from the receipts of a valid appointment letter as a successful service provider.
  - Provincial Sector Skills Plan: A final PSSP will be drafted taking the research done within the sub-sectors into account and triangulation with other data sets as a basis, which must be consistent, valid, and verifiable in terms of content and statistics.
  - The PSSP should be in line with the latest DHET SSP Framework requirements.
  - A Portfolio of Evidence (PoE) must be provided for each chapter. Such evidence will include full quantitative and qualitative data sets (including all interview transcripts, quantitative data sets, etc.); together with synthesis reports and any other requirements deemed necessary by the PSETA including:
- 5.3. A portfolio of evidence (PoE) must be provided for each chapter of the PSSP. Such evidence will include complete raw quantitative data sets and all interview transcripts and voice recordings, together with synthesis reports, as well as any other evidence deemed necessary by the PSETA, submitted on a USB memory stick (ensure the electronic copy submission is readable by any computer).

- 5.4. The PSSP in line with all PSETA requirements as stipulated above, and in accordance with the service level agreement (to be drafted during the appointment of an approved service provider).
- 5.5. Provincial consultative workshop session with the Province Office of the Premier, Provincial departments and state entities as part of the SSP consultation process.
- 5.6. A PowerPoint presentation of the PSSP, which is to be presented to the PSETA by the appointed service provider.
- 5.7. An editorial article for publication in a relevant South African media publication (an Op-ed) and/or a journal paper is produced and published (and if an applicable conference or event is identified, presented at such event).
- 5.8. A project close-out report
- 5.9. Any other required supporting documentation as deemed necessary by the PSETA.
- 5.10. The service provider shall deliver the final and draft PSSPs in line with all PSETA requirements as stipulated above, and in accordance with the service level agreement entered during the appointment of the service provider. The first and final draft PSSPs, including the supporting PoE will be submitted to the PSETA as follows:
  - 5.10.1. The final draft PSSP shall be based on amendments/inputs/additions made to the first draft PSSP by the service provider in accordance with and as required by PSETA recommendations/inputs/etc.

## **6. COMPETENCIES AND SKILLS SET REQUIRED**

The following competencies are expected:

- A. Understanding of the Sector Skill Plan development and skills development in the South African Public Service
- B. Understanding of the SETA environment and the Public Service sector.
- C. Approach, design and methodology for the project (e.g. literature and documentation review, data collection, tools, sample, suggestions for elaboration or changes to scope and methodology as outlined in the TORs, examples of questions suggested, process elements).



- D. Activity-based project plan (including effort for different researchers per activity and time frame linked to activities – it is particularly important that effort levels for key resources are clear). Demonstrate strong project management skills, including field coordination and implementation where necessary. Strong management of resources to deliver high quality research and results on time and to appropriate standards.
- E. Detailed activity-based budget (in South African Rand, including VAT). The proposed project costs must be all inclusive (i.e. including incidental costs, travel costs, disbursements, etc.)
- F. Competence (include list of related projects undertaken of main contractor and sub-contractors, making clear who did what, and contact people for references). Ability to write concise and focused report that are credible, useful and actionable, address key research questions and show the evidence, analysis, synthesis and recommendations.
- G. Team (team members, roles and level of effort for each member of the team). Strong, capable and efficient project team as evidenced by the submission of a detailed organogram indicating the roles and responsibilities of the proposed project team.
- H. Quality assurance plan (to ensure that the process and products are of good quality).
- I. Ability to systematically gather, analyse, synthesise relevant evidence and data from a range of sources, identify relevant materials and assess its quality and identify gaps.
- J. Ability to identify ethical issues relating to research, including potential or actual conflict of interest, protecting confidentiality/ anonymity, and obtaining informed consent from research participants.
- K. Cultural competence - the ability to deal effectively with the different stakeholders involved in the research study especially appropriate language skills.

## **7. STRUCTURE OF PROPOSAL**

7.1. The service provider must provide the following.

7.1.1. Understanding of the research study and the terms of reference (background to the study, rationale, purpose, objectives);

7.1.2. Approach, design and methodology for the research study (e.g. literature and documentation review, a proposed sample of data collection tools, sample, suggestions for elaboration or changes to scope and methodology as outlined in the TOR, examples of research questions suggested, process elements);

7.1.3. Activity-based plan (including number of person days per activity and time frame linked to activities); Activity-based budget (in South African Rand, including VAT);

7.1.4. Competence (include list of related projects undertaken and contactable references);

7.1.5. Team organogram (team members, roles and level of effort of each person involved in the project);

7.1.6. Quality management plan (demonstrate ability to quality assure research process in the methodology to ensure a high quality product and service);

7.1.7. Research policy nexus (indicate how the research findings can be engaged with to promote utilisation by PSETA and the sector;

7.1.8. Schedule of reporting frequency/intervals according to identified outputs.

7.1.9. Risks/mitigation measures.

7.1.10. The following attachments:

- i. References for related research undertaken by the service providers; and
- ii. CVs of key members of the proposed project team
- iii. Certified copies of qualifications of key members of the proposed project team.

## **8. QUALITY ASSURANCE PLAN**

8.1. The purpose of this Quality Assurance Plan for research is to set forth the principles for good research practices, which will in turn be used to institutionalise quality assurance processes through the routine management of research reports.

- 8.2. The provider must attach a clear Quality Assurance Plan for research projects. The PSETA is responsible for monitoring progress, research quality and maintaining regular communications with the external researchers.
- 8.3. Monitoring progress and regular communication with Project Manager will ensure the quality of implementation.
- 8.4. The optimal frequency of communication will vary depending on the study or the phase of the study, but at minimum a monthly check-in is required throughout the project period.
- 8.5. A progress report will be required and scheduled according to the total duration of the project. The progress report will be evaluated with a focus on whether the research is progressing according to plan, noting any actual or anticipated changes to the plan, and whether there have been any new developments in the field that impacts the research design or relevance.
- 8.6. The draft final report should be submitted to the Project Steering Committee, which will be reviewed and commented on. After approval by the Project Steering Committee, the service provider will incorporate the approved comments and changes into the report before the final report can be adopted and submitted.
- 8.7. The above reporting requirement should be factored into the QA planning of the assignment.

## **9. TIME FRAME**

- 9.1. The assignment will take approximately six months from the date of appointment with the expected deadline for closure of project in September 2023. Detailed timelines will be shared with the successful service provider.

## **10. COMPETENCIES OF PROSPECTIVE SERVICE PROVIDER**

10.1. The successful service provider must meet the following for eligibility:

- At least 5-10 years of work experience with regard to Sector Skills Plans development, skills development, human resource planning and development in SA Public Service sector;
- Sound knowledge of the development of Public Service sector;
- Experience in project management in the realm of SSP development, human resource management and development;
- Knowledge of analytics procedures and processes, data modelling and statistical analysis;
- Knowledge of analysing skills audit reports related to specific jobs and competencies;
- Advanced knowledge and experience of organisational development, organisational design, work study, job grading skills audit and skills planning in the Public Service;
- Sound knowledge and experience of skills development legislation;
- Strong reporting, communication, documentation and presentation skills; and
- Demonstration of strong analytical and research skills.

## **11. REPORTING REQUIREMENTS**

11.1. The project manager of the appointed service provider will report to the Skills Planning and Research Manager of PSETA.

11.2. The project will be regularly monitored at determined intervals according to identified outputs.

## 12. COPYRIGHT

All the information derived from this assignment will remain the property of PSETA. This includes data gathering tools, raw data, and all reports. Publication of any information emanating from this research study is prohibited unless permission to cite the findings is approved by the PSETA.

## 13. SUBMISSION OF THE PROPOSAL

The service provider should prepare an offer/proposal on how the assignment will be undertaken, a clear work plan, budget, and curriculum vitae of the expert(s). The proposal must be concise and straight to the point adhering to the timeframe defined under Section 9.

## 14. AVAILABLE DATA/INFORMATION TO THE POTENTIAL SUPPLIER RELEVANT TO THIS BID

The PSETA Sector Skills Plan, Annual Performance Plan, and Annual Report are available on the PSETA website. [www.pseta.org.za](http://www.pseta.org.za).

## 15. PROPOSAL EVALUATION AND APPOINTMENT OF SERVICE PROVIDER

The evaluation will be based on

Phase 1: Functionality Evaluation	
Phase 2: Preferential Point System	Points
Price	80
<b>Special goals</b>	<b>20</b>
Black owned company	8
Women	4

Youth	5
Disability	3
<b>Total</b>	<b>100</b>

## PHASE 1 – FUNCTIONALITY EVALUATION

Bids must meet the minimum eligibility criteria in respect of functionality of 75 points out of 100 points that will be awarded for functionality before they are considered further. Any bid that does not meet the minimum eligibility threshold will be automatically disqualified. The functionality criteria together with the maximum points to be awarded are set out below.



The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for Specific goals, once the minimum functionality criteria are met. The evaluation will be based on:

Domain	Evaluation Method	Criteria	Weight	Score
1. Proposal and Project Plan:	<ul style="list-style-type: none"> <li>Proposal with Project plan displaying an understanding and knowledge on Sector Skills Plan development and skills development.</li> <li>Detailed In-depth project plan detailing timeframes for the project, activity-based plan, detailed activity-based budget and quality assurance plan.</li> </ul>	<b>NB: All proposals must cover sections outlined in section 7.</b> <ul style="list-style-type: none"> <li>1 = Proposal and project plan not acceptable (<b>all areas not covered</b>).</li> <li>2 = Poorly written proposal and a project plan (<b>few areas covered</b>)</li> <li>3 = Average proposal (<b>most areas covered</b>)</li> <li>4 = Good proposal (<b>all areas covered but not in depth</b>)</li> <li>5 = Excellent detailed proposal (<b>all areas thoroughly addressed in depth</b>)</li> </ul>	25	1
				2
				3
				4
				5



Domain	Evaluation Method	Criteria	Weight	Score
<b>2. Knowledge and experience of Project Manager</b>	<p>The Project manager must have:</p> <ul style="list-style-type: none"> <li>an appropriate academic qualification and at least 5-10 years of work experience in Sector Skills Plan development, public sector reform, skills development in the Public Service sector, education and training policy, and skills development policy.</li> <li>Attach CV and certified copies of qualifications. Proof of SAQA evaluation must be provided in the case of foreign qualifications.</li> </ul>	<ul style="list-style-type: none"> <li>1= No submission of CV and/ or certified copies of qualifications</li> <li>2= CV, Certified copies of qualifications and less than 5 years' experience</li> <li>3 = CV, Certified copies of qualifications and a minimum of 5 years' experience.</li> <li>4 = CV, Certified copies of qualifications and a minimum of 6 to 9 years' experience.</li> <li>5 = CV, Certified copies of qualifications and 10 years and above experience.</li> </ul>	<b>25</b>	<b>1</b>
				<b>2</b>
				<b>3</b>
				<b>4</b>
				<b>5</b>
	Extent to which the design concept reflects the objectives noted in this bid.	<ul style="list-style-type: none"> <li>1 = No Methodology or Methodology not covering all areas of <b>Section 7</b>.</li> </ul>	<b>25</b>	<b>1</b>

Domain	Evaluation Method	Criteria	Weight	Score
<b>3. Project design and Approach/Methodology</b>	<ul style="list-style-type: none"> <li>Data collection methods, sources of information/documentation, research sources and literature clearly indicated and relevant to the scope of work.</li> <li>Use of knowledge base of research methodology, public sector, education and training, capacity development, critical thinking, analytical and synthesis skills relevant to the research, and use evidence appropriately to inform findings and recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>2 = Methodology covering few areas of <b>Section 7</b>.</li> <li>3 = Methodology covering most areas of <b>Section 7</b>.</li> <li>4 = Methodology covering all areas of <b>section 7</b>. but not in depth.</li> <li>5= Excellent detailed methodology with all areas thoroughly addressing <b>Section 7</b>.</li> </ul>		2
				3
				4
				5
<b>4. Writing and Communication</b>	Provide at least 3 sample research study reports of previous work produced in similar or/and related	<ul style="list-style-type: none"> <li>1= No research study reports provided of similar work undertaken previously.</li> </ul>	<b>10</b>	<b>1</b>

Domain	Evaluation Method	Criteria	Weight	Score
	<p>projects. <i>Project Manager/Team Leader should have been involved in the drafting of the report</i></p> <ul style="list-style-type: none"> <li>Must write clear, concise and focused reports that are credible, useful and actionable, address the key questions, and show the evidence, analysis, synthesis, recommendations and evaluative interpretation and how these build from each other.</li> </ul>	<ul style="list-style-type: none"> <li>2 = Research reports provided not in areas of similar work.</li> <li>3 = 1 sample research report of previous work in similar project provided.</li> <li>4 = 2 sample research reports of previous work in similar project(s) provided.</li> <li>5 = 3 sample research reports of previous work in similar project(s) provided.</li> </ul>		<div>2</div> <div>3</div> <div>4</div> <div>5</div>
<b>5. References</b> Traceable references of clients where projects of	Reference letters as evidence of previous research studies conducted. (NB: <i>The Reference Letter(s) must be in the letterhead of the previously serviced organisation</i> )	<ul style="list-style-type: none"> <li>1 = No reference letter provided of work previously done.</li> <li>2 = 1 to 2 reference letters of research work previously done</li> </ul>	15	<div>1</div> <div>2</div>

Domain	Evaluation Method	Criteria	Weight	Score
similar nature were conducted.	<i>and should reflect at least name of the organisation, title of the study, year conducted, year completed, contactable reference name and contact details)</i> <b>Reference letters must be on a letterhead, signed by the CEO/Head and dated.</b>	<ul style="list-style-type: none"> <li>• 3 = 3 reference letters of work previously done</li> <li>• 4 = 4 reference letters of work previously done.</li> <li>• 5 = 5 or more reference letters work previously done.</li> </ul>		3
				4
				5
<b>Total</b>			<b>100</b>	

## 17. FORMAT OF THE BID SUBMISSION

- 17.1. Company profile indicating all the requirements as per the evaluation criteria
- 17.2. Methodology and Approach (detailed project plan)
- 17.3. Team member names and roles
- 17.4. CV and certified copies of qualifications
- 17.5. Track record and experience
- 17.6. Submission of all applicable documents as indicated below:
  - Certified copy of doctor's certification with medical practice number.
  - Certified copies of the director's ID's document.
  - Valid Tax compliance status (TCS) PIN or proof of exemption from SARS;
  - Copy of the registration document of the organisation (CIPC);
  - Copy of the Central Supplier Database registration.

## 18. COSTING

- 18.1. A cost analysis must be given to cover the full project amount. The proposed project pricing must be all-inclusive (i.e. including professional fees, venue hire, travel expenses, disbursements and VAT). The PSETA may require a breakdown of rates on any of the items priced and service providers are required to provide same. Incidental costs shall be in line with the National Treasury Instruction Note 1 of 2013/14. Expenditure incurred without the prior approval of the organisation will not be reimbursed. PSETA reserves the right to negotiate the selection/prioritisation of deliverables in line with the contract price.
- 18.2. The budget should indicate clearly all the cost elements which will be involved. All prices should be quoted in South African Rands (ZAR).

## 19. IMPORTANT MANDATORY INFORMATION FOR BIDDERS

20.1 Proposals must be submitted electronic, the requestion (RFQ) number must be indicated on the line subject.

20.2. A valid Tax compliance status (TCS) PIN or proof of exemption from SARS.

20.3. All Standard Bidding documents (SBD) documents must be completed and signed.

- SBD 4
  - SBD 6.1
  - Proof of registration on Central Supplier Database.

NB: Please note that failure to submit documents requested on section 20(20.3) will render the proposal disqualified.

**Bid applications must be submitted to:**

**Ms Lungile Mokoena**

email on [lungilem@pseta.org.za](mailto:lungilem@pseta.org.za) or [SCM@pseta.org.za](mailto:SCM@pseta.org.za)

Please direct all queries to **Ms Lungile Mokoena** via email on [lungilem@pseta.org.za](mailto:lungilem@pseta.org.za)

