



**REQUEST FOR BIDS**

**BID DETAILS**

<b>BID NUMBER:</b>		<b>FB-SETA (24-25) T0005</b>	
<b>CLOSING</b>	<b>Date:</b>	<b>09 April 2025</b>	
	<b>Time:</b>	<b>12:00 pm</b>	
<b>DESCRIPTION:</b>		<b>Appointment of a service provider to assist FoodBev SETA with closing out the legacy discretionary grant projects.</b>	
<b>TECHNICAL QUERIES</b>			
<b>EMAIL ADDRESS:</b>		<a href="mailto:scm@foodbev.co.za">scm@foodbev.co.za</a>	
<b>COMPULSORY BRIEFING SESSION:</b>	<b>Date:</b>	<b>26 March 2025</b>	
	<b>Time:</b>	<b>10:00 am to 11:00 am via Microsoft Teams</b>	
<b>Validity Period</b>		<b>120 Days</b>	

**DETAILS OF BIDDER**

**Organisation/individual:** \_\_\_\_\_

**Contact person:** \_\_\_\_\_

**Telephone/ Cell number:** \_\_\_\_\_

**E-mail address:** \_\_\_\_\_

**TOTAL BID PRICE**  
**(inclusive of VAT)** \_\_\_\_\_

## GLOSSARY

<b>AWARD</b>	Conclusion of the procurement process and final notification to the effect to the successful bidder
<b>B-BBEE</b>	Broad-based Black Economic Empowerment in terms of the Broad-based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003) and the Codes of Good Practice issued thereunder by the Department of Trade and Industry
<b>BID</b>	Written offer in a prescribed or stipulated form in response to an invitation by FOODBEV SETA for the provision of goods, works or services
<b>CONTRACTOR</b>	Organisation with whom FOODBEV SETA will conclude a contract and potential service level agreement subsequent to the final award of the contract based on this Request for Bid
<b>CORE TEAM</b>	The core team are those members who fill the non-administrative positions against which the experience will be measured.
<b>DTI</b>	Department of Trade and Industry
<b>EME</b>	Exempted Micro Enterprise in terms of the Codes of Good Practice
<b>GCC</b>	General Conditions of Contract
<b>GRAP</b>	A set of concepts that function as guidelines for the accounting processes in the public sector
<b>IP</b>	Intellectual Property
<b>ACCA</b>	The Association of Chartered Certified Accountants
<b>AGA</b>	Associate General Accountant AGA(SA)
<b>AGSA</b>	The Auditor-General of South Africa
<b>CGMA</b>	Chartered Global Management Accountant
<b>SAICA</b>	The South African Institute of Chartered Accountants (SAICA)
<b>SAIPA</b>	The South African Institute of Professional Accountants (SAIPA)
<b>SIMS</b>	Solugrowth Information Management System
<b>FOODBEV SETA (FBS)</b>	Food and Beverage Manufacturing Sector Education and Training Authority
<b>ORIGINAL BID</b>	Original document signed in ink, or Copy of original document signed in ink,
<b>ORIGINALLY CERTIFIED</b>	To comply with the principle of originally certified, a document must be both stamped and signed in original ink by a commissioner of oaths.
<b>SCM</b>	Supply Chain Management
<b>SLA</b>	Service Level Agreement
<b>SCHEDULE 3A ENTITY</b>	As per the classification by National Treasury these refer to other National public entities

## TABLE OF CONTENTS

GLOSSARY.....	2
SECTION A .....	4
1. INTRODUCTION .....	4
1.1. BACKGROUND.....	4
1.2. PURPOSE.....	4
1.3. OBJECTIVE.....	4
2. SCOPE OF WORK.....	5
2.1. DELIVERY OF THE PROJECT .....	5
2.2. PROJECT DURATION .....	5
SECTION B .....	6
3. THE BID EVALUATION PROCESS.....	6
3.1 STAGE 1: ADMINISTRATIVE REQUIREMENTS: .....	6
3.2 STAGE 2: MANDATORY CRITERIA: .....	7
3.3 STAGE 3: FUNCTIONAL EVALUATION CRITERIA: .....	7
3.4 STAGE 4: PREFERENCE POINTS SYSTEM .....	10
SECTION C .....	12
4. AUTHORISATION.....	14
.....	14

---

## SECTION A

### 1. INTRODUCTION

#### 1.1. Background

The Food and Beverages Manufacturing Sector Education and Training Authority (FoodBev SETA) is a Schedule 3A Public Entity established under the **Skills Development Act 97 of 1998**. FoodBev SETA is mandated to promote, facilitate, and incentivise skills development within the Food and Beverages Manufacturing Sector. As one of the 21 Sector Education and Training Authorities (SETAs) in South Africa, FoodBev SETA is responsible for implementing the **National Skills Development Plan (NSDP)**.

FoodBev SETA awards discretionary grants to fund skills development initiatives, funded through the **Skills Development Levy (SDL)** contributions from employers in the sector. These grants are governed by various legislative frameworks, including the **Skills Development Act, Public Finance Management Act (PFMA)**, and **SETA Grant Regulations**.

To ensure compliance with these frameworks and to maintain accurate financial records, FoodBev SETA requires the services of a qualified and experienced service provider to review, validate, recalculate, and substantiate all commitments in its commitment register. This includes verifying contracts, conducting site visits, and ensuring the accuracy of the commitment register for audit purposes.

#### 1.2. Purpose

The purpose of this project seeks to appoint a suitably qualified and experience service provider to:

- Review, validate, recalculate, and substantiate all commitments in the FoodBev SETA commitment register.
- Ensure all commitments are supported by valid contracts, award letters and/or commitment letters, and learner agreements.
- Recommend the termination of projects and recovery of grants.
- Provide a complete, accurate, and valid commitment register for the 2024/25 financial year, free of material misstatements.
- Automate the Commitment register by transferring manual data into the projects management module on SIMS, ensuring that information transferred is complete, valid and accurate.

#### 1.3. Objective

The key objectives of the project are:

- To validate and substantiate all commitments in the commitment register, ensuring compliance with the **SETA Grant Regulations** and **Generally Recognised Accounting Practices (GRAP)**.
- To reconcile the commitment register with financial system and the grant administration/performance information system (SIMS).
- To recommend the termination of legacy projects with no progress and facilitate the initiation of grant recovery processes, where necessary.
- To provide audit support and ensure the final commitment register is ready for submission to auditors by **31 May 2025**.
- To complete knowledge transfer to FoodBev SETA employees to ensure sustainability and capacity building.

## 2. Scope of Work

The appointed service provider will be required to perform the following tasks:

- a) Submission of a valid, complete and accurate commitment register.
- b) Conduct site visits for project verification, where necessary
- c) Enhance standard operating procedures for the commitment register process
- d) Provide reports on progress of the project and final close out reports
- e) Provide audit support for the validation of the commitment register
- f) Automate the Commitment register by transferring manual data into the projects management module on SIMS, ensuring that information transferred is complete, valid and accurate.
- g) Knowledge transfer and training of internal officials

### 2.1. Delivery of The Project

The service provider will be required to deliver the following:

- a) A reconciled, validated and substantiated commitment register for the 2024/25 financial year.
- b) Reconciliation reports between the financial system, SIMS, and commitment register.
- c) Reports from site visits with recommendations on the status of the contracts including but not limited to terminations, cancellations, completions and report on grant recoveries, where applicable.
- d) Audit-ready commitment register and supporting evidence.
- e) Liaise with auditors in responding to any audit queries relating to the commitment register.
- f) Automated commitment register.
- g) Business process documents (SOP's) for commitment register.
- h) Detailed reports on findings, including recommendations for process improvements.
- i) Knowledge transfer documentation including and training materials.

### 2.2. Project Duration

- It is expected that the project will be for a duration of 12 months, the objective is for the bidder to submit an accurate, complete and valid commitment register by 31 May 2025

and assist with audit support and providing of evidence and responses to queries from auditors up until the audit is finalised on the 31<sup>st</sup> July 2025. The bidder will be required to automate the Commitment register by transferring manual data into the projects management module on SIMS, ensuring that information transferred is complete, valid and accurate. This process must be completed by 31 March 2026.

**SECTION B**

**3. THE BID EVALUATION PROCESS**

Bid submissions will be evaluated in accordance with the below tender evaluation stages:

**3.1 STAGE 1: Administrative Requirements:**

<p><b>Description of the criteria</b></p>	<p>a) The potential bidder must submit <b>three (3) copies</b> of the bid proposal as follows:</p> <ul style="list-style-type: none"><li>i) Two (2) hard copies</li><li>ii) One (1) electronic copy in PDF format saved on a USB memory stick</li></ul> <p><b>Requirements for Hard Copies:</b></p> <ul style="list-style-type: none"><li>i) The bid proposal must be securely bound, hole-punched, and sequentially numbered in accordance with the response format outlined in Section 4 of this bid document.</li></ul> <p><b>Requirements for Electronic Copy:</b></p> <ul style="list-style-type: none"><li>ii) The electronic copy must be saved in PDF format on a USB memory stick.</li><li>iii) The files must be organized into clearly labelled, paginated, and indexed folders in accordance with the response format outlined in Section 4 of this bid document.</li></ul> <p><b>Important Note:</b> FBS will not be responsible for any misinterpretation or misplaced information resulting from a proposal that is not properly labelled, paginated, and indexed.</p>
---	---

### 3.2 STAGE 2: Mandatory Criteria:

<b>Description of the criteria</b>	a) Attendance of compulsory briefing session. A virtual briefing session will be held <b>from (10:00) to (11:00) via Microsoft Teams</b> . Interested bidders are encouraged to RSVP (with the bid reference number as the subject of the email) two days before the session to the email: <a href="mailto:scm@FoodBev.co.za">scm@FoodBev.co.za</a>
<b>Means of verification</b>	a) This will be verified by the bidder signing the online attendance register at compulsory briefing session.

Failure to comply with the mandatory requirements will result in the rejection of the bidder's submission.

### 3.3 STAGE 3: FUNCTIONAL EVALUATION CRITERIA:

**3.3.1** Bidders must meet the minimum functionality of **80.00** points out of 100 points in order to be evaluated further. Any bid that does not meet the minimum threshold will be automatically disqualified. See detailed scoring criteria below.

<b>1. CRITERIA: BIDDER'S RELEVANT EXPERIENCE</b>	<b>WEIGHTING ALLOCATED</b>	
The bidder must provide reference letters from contactable clients (excluding FoodBev SETA) for providing commitment register review or similar services. The reference letters must be on the bidder's client's letterhead, duly signed by the authorized person, reflecting the (i) <b>nature of the service provided</b> , (ii) <b>level of satisfaction for the service and performance of the bidder</b> and (iii) <b>number of years that the service was rendered</b> .	<b>25.00</b>	
✓ No relevant reference letter		<b>0.00</b>
✓ One relevant reference letter		<b>10.00</b>
<b>REQUIRED SUPPORTING DOCUMENTATION:</b> i. Relevant references should refer to the experience and level of service provided by the bidder in the review and update of a commitment register or similar assignments.		
<b>Bonus points:</b> A reference letter signed by the Chief Financial Officer of a SETA, indicating level of satisfaction for the service and performance of a bidder in developing a commitment register that is complete, valid and accurate, and did not result in any material adjustments from the auditors.	<b>15.00</b>	
<b>2. METHODOLOGY, TECHNICAL PROPOSAL, AND IMPLEMENTATION PLAN</b>	<b>WEIGHTING ALLOCATED</b>	
Bidders will be assessed based on their ability to demonstrate a clear understanding of the project scope and their proposed methodology for delivering the project. The following criteria will be used to evaluate the bidder's proposal:  a. The bidder must present a detailed project plan reflecting <b>milestones, timeframes, and resources</b> required to complete the project. The plan must align		

<p>with the project timeline, including the submission of the final commitment register by <b>31 May 2025</b>.</p> <p>b. The bidder must provide a clear and detailed methodology clearly indicating:</p> <ul style="list-style-type: none"> <li>i. Understanding of scope of work</li> <li>ii. Methodology for submitting complete, valid and accurate commitment register</li> <li>iii. Experience in conducting site visits.</li> <li>iv. Activities to achieve project objectives</li> <li>v. Identification and mitigation of challenges and risks</li> <li>vi. Implementation plan that demonstrates the bidder's capacity to deliver the project within the stipulated timeframe and budget.</li> </ul>	<b>15.00</b>	
<p>✓ <b>Unacceptable:</b> Does not meet the requirements. Bidder did not sufficiently demonstrate understanding of the scope of work and how the scope will be implemented</p>	<b>0.00</b>	
<p>✓ <b>Good:</b> Satisfies the requirements. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled.</p>	<b>5.00</b>	
<p>✓ <b>Excellent:</b> Satisfies the requirements The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full. The response is not generic but is organisation specific, properly detailing how the bidder will submit a complete, valid and accurate commitment register and how the bidder will ensure that all audit queries are adequately and efficiently addressed.</p>	<b>15.00</b>	
<p><b>3.CAPACITY TO DELIVER (RESOURCES)</b></p> <p>The Bidder should provide an organogram outlining the role and qualifications of each resource allocated to the project</p>		<p><b>WEIGHTING ALLOCATED</b></p>
<p><b>3.1 Project Leader</b></p>		
<p>Submit an abridged CV for the Project Leader highlighting qualifications and experience. The Project Leader must possess an (NQF Level 8) in accounting or finance or auditing or equivalent, and a minimum five (5) years' experience preparing financial statements for audit, or experience in project leading projects of a similar nature in the past five (5) years.</p>		
<p>✓ Project Leader has no relevant qualification and no relevant experience</p>	<b>0.00</b>	
<p>✓ Project Leader has relevant qualification but has minimum of 3 years but less than 5 years relevant experience</p>	<b>5.00</b>	
<p>✓ Project Leader has relevant experience but does not possess relevant qualification</p>	<b>5.00</b>	
<p>✓ Project Leader has relevant qualifications and has 5 years or more relevant experience</p>	<b>10.00</b>	
<p><b>REQUIRED SUPPORTING DOCUMENTATION:</b> Abridged CV for the dedicated Project Leader reflecting relevant qualifications and experience in preparing financial statements for audit or experience in project leading projects of a similar nature in the past five (5) years.</p>		<b>10.00</b>
<p><b>3.2: Project Manager</b></p>		

<p>Submit an abridged CV for the dedicated Project Manager reflecting relevant qualifications, and experience in preparation or audit of financial statements with a focus on preparation of financial statements</p> <p>The project manager must possess at least an NQF Level 7 in accounting, auditing or related qualification with a minimum of five (5) years' experience in the preparation or review, audit of financial statements or commitment register</p>		<b>15.00</b>
<ul style="list-style-type: none"> <li>▪ Project Manager has no relevant qualifications and no relevant experience</li> </ul>	<b>0.00</b>	
<ul style="list-style-type: none"> <li>▪ Project Manager has relevant qualification but has a minimum of 3 years but less than 5 years relevant experience</li> </ul>	<b>5.00</b>	
<ul style="list-style-type: none"> <li>▪ Project Manager has relevant experience but does not possess relevant qualification</li> </ul>	<b>5.00</b>	
<ul style="list-style-type: none"> <li>▪ Project Manager has relevant qualifications and has 5 years or more relevant experience</li> </ul>	<b>10.00</b>	
<p><b>REQUIRED SUPPORTING DOCUMENTATION:</b> Abridged CV for the dedicated Project Manager reflecting relevant qualifications, professional affiliation and a minimum of 5 years' experience in preparation, review or audit of financial statements, and include certified copies of qualifications or certificates.</p>		
<p><b>Bonus Point:</b> Project Manager possessing a recognised project management professional certificate from Project Management Institute (PMI) will earn a bonus point and must provide the certified copy from the professional body.</p>	<b>5.00</b>	
<b>3.2: Project Team</b>		<b>WEIGHTING ALLOCATED</b>
<p>Submit abridged CVs for the team members that will be allocated to the project. The bidder must allocate a minimum of three (3) members to this project. Each member of the project team must possess a Diploma in Accounting/Finance/Auditing (NQF Level 6), with a minimum of three (3) years' experience working in a finance/accounting /auditing environment, responsible for activities that will lead to preparation of financial statements or auditing of financial statements.</p>		
<ul style="list-style-type: none"> <li>✓ No relevant qualification and experience of the team</li> </ul>	<b>0.00</b>	<b>35.00</b>
<ul style="list-style-type: none"> <li>✓ The team has relevant qualifications but has less than one-year relevant experience</li> </ul>	<b>10.00</b>	
<ul style="list-style-type: none"> <li>✓ The team has relevant qualifications but has a minimum of one year but less than 3 years relevant experience</li> </ul>	<b>10.00</b>	
<ul style="list-style-type: none"> <li>✓ The team has relevant qualifications and has a minimum of 3 years relevant experience</li> </ul>	<b>35.00</b>	
<p><b>REQUIRED SUPPORTING DOCUMENTATION:</b> Provide an abridged CV for each member of the Project Team reflecting relevant qualifications and experience working in a finance/accounting/auditing environment, responsible for activities that will lead to preparation of financial statements or auditing of financial statements. The CVs must include copies of certified qualification/s for each team member. A minimum of 3 team members is required to be allocated points. Each team member must possess the required qualification and relevant experience to get points.</p>		
<b>Total</b>		<b>100.00</b>

### 3.4 STAGE 4: PREFERENCE POINTS SYSTEM

The 80/20 preference points system will be utilized for this bid. This preference points system is for the acquisition of goods or services with a Rand value up to R50 million as follows:

Criteria	Means of Verification	Points
Price	Proposed Bid Price	80.00
Preference Points	Specific Goals	20.00
<b>Total Points</b>		<b>100.00</b>

**3.4.1** The following allocation will determine the specific goals (20.00 points) for this tender process:

Category	% Allocation for each category	Points allocated
South African Black People Ownership (> 51% South African blacks)	50%	10.00
Woman Ownership	40%	8.00
Black Youth	5%	1.00
People with Disabilities (PwD)	5%	1.00
<b>Total</b>	<b>100%</b>	<b>20.00</b>

**3.4.2** Bidders must submit the following documents as a means of verification for specific goals, certified where a document is a copy:

- a) CIPC documents (company registration documents),
- b) Shareholder certificates, and
- c) Copy(s) of Identity document(s) for shareholder(s).
- d) Central Supplier Database full report. (Not Summary)

**3.4.3** Bidders who fail to submit the mandatory documents will not qualify for points allocated for specific goals.

### 3.4.4 Pricing Schedule

- a. Bidders must complete the below pricing table for full price evaluation. The following table illustrates the price breakdown required.
- b. FoodBev SETA will provide overheads e.g. Office space, parking, telephone, and wi-fi access
- c. Other expenses must be clearly stipulated on an itemised basis
- d. Bidders should indicate number of project team members that they propose for the project
- e. Rates may not be lower than the DPSA rates for consultants.

<b>Team members</b>	<b>Number of resources</b>	<b>Rate Per Hour</b>
Project Leader	1	
Project Manager	1	
Project Team	3	
<b>Other expenses</b>		
<b>TOTAL (excl VAT)</b>		
<b>VAT</b>		
<b>TOTAL (incl VAT)</b>		

## SECTION C

### TENDER SUBMISSION INSTRUCTIONS

- 1.1. Tenders should be submitted in triplicate consisting of Two hard copies (one original and one copy) and one electronic copy, all bound in a sealed envelope endorsed,  
**BID No: FB-SETA (24-25) T0005: Appointment of a service provider to assist FoodBev SETA with closing out the legacy discretionary grant projects.** The sealed envelope must be placed and be deposited in the FoodBev SETA Tender Box, Ground Floor, 7 Wessels, Rivonia, Sandton, 2128 no later than closing time and date.
- 1.2. Bids must be submitted in a prescribed response format herewith enclosed as "Response Format".
- 1.3. The closing date, company name and the return address must also be endorsed on the envelope.
- 1.4. If a courier service company is being used for delivery of the tender document, the tender description must be endorsed on the delivery note/courier packaging and the courier must ensure that documents are placed / deposited into the tender box. FoodBev SETA will not be held responsible for any delays where tender documents are handed to the FoodBev SETA Receptionist and/or arrives late.
- 1.5. Courier Company should indicate on the submission register who they are submitting on behalf of.
- 1.6. No bids received by telegram, telex, email, facsimile, or similar medium will be considered.
- 1.7. Where a tender document is not in the tender box at the time of the tender closing, such a tender document will be regarded as a late tender. FoodBev SETA reserves the right not to consider/evaluate any late tender response.
- 1.8. All the documentation submitted in response to this bid must be in English.
- 1.9. The bidder is responsible for all the costs that they shall incur related to the preparation and submission of the tender document.
- 1.10. Bids submitted by bidders must be signed by a person or persons duly authorised thereto by a resolution of a Board of Directors (if applicable), a copy of which Resolution, duly certified be submitted with the Tender.
- 1.11. Bidders should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by FoodBev SETA regarding anything arising from the fact that pages are missing or duplicated.
- 1.12. A valid tax clearance certificate or confirmation of pin must be included in the bid response.
- 1.13. A copy(s) of certificates from the organizations/ bodies that the bidder is affiliated to must be included in the bid response.
- 1.14. Certified copies must not be more than 6 months.
- 1.15. FoodBev SETA reserves the right to call bidders for further presentation of their service or perform due diligence before awarding.

- 1.16. Foreign qualifications must be accompanied by a SAQA evaluation report to be considered.
- 1.17. The FoodBev SETA reserves the right to conduct supply chain due diligence process, including site visits and inspections at any time during the bidding and contract period.
- 1.18. Resources will be based at FoodBev SETA offices.
- 1.19. Where disbursements are charged, they must be based on bidders office to FBS offices.
- 1.20. Rejection of bids: FoodBev SETA reserves the right not to proceed with the award of the proposal.

## **2. RESPONSE FORMAT**

- 2.1. The soft and hard copy responses from all bidders must be prepared in line with the following section:
- 2.2. Bidders shall submit their responses in accordance with the response format specified below (each schedule must be clearly marked, indexed and /or numbered):
  - 2.2.1. Cover Page: The cover page must clearly indicate the bid reference number, bid description and the bidder's name.
  - 2.2.2. Schedule 1:
    - a. Executive Summary/Cover Letter – The cover letter should be brief (not more than two pages maximum). Describe why your company/consortium considers it to be best qualified to achieve any of the services listed in scope of work.
    - b. Brief company profile (Five pages maximum)
    - c. Original certified copy of the company's professional accreditation where applicable.
    - d. References letters signed by clients for similar work completed in the past five years.
    - e. Qualifications and Experience – This section shall contain certified copies of qualification and CVs of the proposed project personnel. Foreign qualifications must be accompanied by a SAQA evaluation report to be considered.
    - f. List of Project Personnel – This section must include the project personnel including project lead, project manager and three project team members. The roles and responsibilities of each personnel must be listed.
    - g. Methodology and approach including project plan
    - h. Signature Requirements: All bids must be signed. A bid may be signed by an officer or other agent of a registered vendor, if authorised to sign contracts on its behalf; a member of a consortium or joint venture or other agent authorised by a Power of Attorney. The name and title of the

individual(s) signing the bid must be clearly shown immediately below the signature.

**2.2.3. Schedule 2:**

- a. Valid tax clearance certificate or confirmation of pin.
- b. Originally Certified copies of the bidders CIPC / or company registration documents listing all members with percentages, in case of a CC. Or latest certified copies of all share certificates in case of a company.
- c. Certified ID copies of all directors.
- d. A certified copy of the B-BBEE certificate (or an original affidavit signed by a Commissioner of Oaths regarding the B-BBEE status)
- e. Submission of proof of the bidder's registration on the CSD (Full report)
- f. Submission of fully completed and signed SBD forms (Annexure B and C)

***Note: If a Consortium, Joint Venture or Subcontractor, the documents listed above must be submitted for each Consortium/ JV member or subcontractor. A consolidated B-BBEE certificate is required for Joint Venture bidders.***

**4. AUTHORISATION**

*The BAC committee hereby confirms that the information included in this bid document is agreed upon by all members, and is compliant, accurate, valid and complete.*

**SIGNATORIES:**

**Recommended by the BAC Chairperson: Mr Bafana Dhlamini**

Signature: 

Date: 17 March 2025

---

**Approved by the CEO: Ms Nokuthula Selamolela**

Signature: 

Date: 17.03.2025

---