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**RFQ NO: 70 - 2023/24**

## **REQUEST FOR QUOTATIONS**

### **TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT AN SCM POLICY REVIEW FOR THE ETDP SETA**

#### **1. INTRODUCTION**

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

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

#### **2. PURPOSE AND OBJECTIVES**

##### **2.1. PURPOSE AND BACKGROUND**

The Education, Training and Development Practices SETA would like to appoint a service provider that will conduct a review of the Supply Chain Management (SCM) policy. There are changes that were affected on the policy to ensure compliance implementation of National Treasury instruction notes, with n the Preferential Procurement Policy Framework ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations as amended in 2022. It is also important that the ETDP SETA aligns its policy with national objectives on Broad Based Black Economic Empowerment (B-BBEE) Act in the specific goals.

In order for the ETDP SETA to meet its objectives and ensure adherence to the economic objectives or socio-economic objectives, an independent experienced service provider of policy development is needed to review, recommend and update the policy.

#### **3. SCOPE OF WORK**

The Service Provider must perform the following:

##### **3.1. ROLES AND RESPONSIBILITIES**

- 3.1.1. Develop a plan to review the ETDP SETA SCM policy with relevant supply chain management and procurement legislative provisions. Legislative provisions should not only be limited to National Treasury requirements but other provisions which have an impact on procurement.

- 3.1.2. Perform SCM policy review according to the plan approved by the Finance and Audit Committee
- 3.1.3. Review and appraise the adequacy and effectiveness of the SCM policy for internal controls.
- 3.1.4. Review the compliance with policy, plans, procedures, statutory requirements, and regulations, which could have a significant impact on operations.
- 3.1.5. Review the SCM policy changes and ensure alignment with the following.
  - 3.1.5.1. Broad Based Black Economic Empowerment (B-BBEE) Act and the Code of Good Practice,
  - 3.1.5.2. Preferential Procurement Policy Framework Act (PPPFA),
  - 3.1.5.3. Instructions Notes and Supply Chain Management Practice Notes and the Specific goal.
- 3.1.6. Have an understanding and knowledge of the Supply Chain Management cycle which includes demand, acquisition, logistics, disposal, and supplier relationship management.
- 3.1.7. Present changes to the Audit and finance committee
- 3.1.8. Present to SCM and Finance unit changes made and importance thereof.

### **3.2. QUALITY ASSURANCE REVIEWS**

- 3.2.1. The appointed service provider shall ensure that all work performed is aligned to National Treasury regulations.

### **3.3. PROFILE OF PROVIDER**

The Supply Chain Management (SCM) practitioner must have the following qualifications;

- Member of the Chartered Institute of Procurement and Supply (**MCIPS**)
- Postgraduate in Supply Chain Management
- Honors in Supply Chain Management
- Bachelor of Commerce in Supply Chain Management
- Degree in Supply Chain Management.

**4. COSTING MODEL (PRICE SCHEDULE)**

**COST COMPARISON**

**THIS COSTING MODEL MUST NOT BE MODIFIED AT ALL, AND IF RETYPED ALL LINE ITEMS IN ORDER AS STATED BELOW TO BE INCLUDED.**

<b>DESCRIPTION OF SERVICES REQUIRED: SCM POLICY REVIEW</b>			
<b>NAME OF SERVICE TO BE RENDERED: CONDUCT A SUPPLY CHAIN MANAGEMENT POLICY REVIEW</b>			
<b>No</b>	<b>DELIVERABLES</b>	<b>RATE PER HOUR</b>	<b>TOTAL COST ("R")</b>
1.	Review of SCM policy		
2.	Final report		
<b>VALUE ADDED TAX @ 15% (IF APPLICABLE)</b>			
<b>TOTAL COST (VAT INCLUSIVE)</b>			
<b>ALL COSTS MUST BE INCLUSIVE OF VAT, IF THE BUSINESS IS VAT REGISTERED</b>			

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

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

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

**5. DURATION OF THE PROJECT**

It is expected that the ETDP SETA will enter into a service level agreement (SLA) with the successful bidder. The duration of the project will be **three (3)** months. The duration of the project will commence from date of last signature on the SLA.

## 6. EVALUATION CRITERIA

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

*Folder A (USB) must have documents for Stage 1 and Stage 2*

### 6.1. STAGE 1 [Folder A (USB)]

*Bidders will be evaluated on the submission of the requested mandatory documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked.*

<b>6.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION</b>
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1. Registration of the Supply Chain Management practitioner with relevant Supply Chain body, i.e., Chartered Institute of Procurement & Supply (**CIPS**) or South African Production and Inventory Control Society (**SAPICS**) or Council of Supply Chain Management Professionals (**CSCMP**) or Association for Supply Chain Management (**APICS**) or Institute for Supply Management (**ISM**).

***NB: Failure to submit any of the above-requested mandatory documents will lead to disqualification***

### 6.2. STAGE 2 [Folder A (USB)]

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

- a) The minimum qualifying score for functionality will be **70 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
- b) Only bids that achieved the minimum qualifying score for functionality will be evaluated further in accordance with the 80/20 preference point systems prescribed in Preferential Procurement Regulations **5 and 6**.

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

NO.	CRITERIA	POINTS
1.	<p><b>Experience &amp; References</b> of service providers in doing business of a similar nature, SCM Policy Review, for a government institution. The reference letter must be on the customer's letterhead with contactable references.</p> <p><b>1.1. Reference letters signed and in the clients' letterheads: 15</b></p> <ul style="list-style-type: none"> <li>• Three (3) reference letters submitted = <b>15</b></li> <li>• Two (2) reference letters submitted = <b>10</b></li> <li>• One (1) reference letter submitted = <b>0</b></li> </ul> <p><b>1.2. The cumulative experience of the company in conducting similar projects in organisational design/ development (from the above letters): 25</b></p> <ul style="list-style-type: none"> <li>• 5 years and above = <b>25</b></li> <li>• 3- 4 years = <b>20</b></li> <li>• 1 - 2 years = <b>10</b></li> </ul> <p><b>*[Each reference must clearly indicate;</b></p> <ul style="list-style-type: none"> <li>• <b>the name of the bidder and the project</b></li> <li>• <b>objectives of the project (nature of the project)</b></li> <li>• <b>duration of the project</b></li> <li>• <b>recommendation and contact details of the referee as well as proof of completed project(s) and</b></li> <li>• <b>must be signed.</b></li> </ul> <p><b>NB: If any of the above information is omitted/missing, will lead to the reference letter(s) not allocated points.</b></p>	<b>40</b>
2.	<p><b>Qualifications, experience of team members and CV; (Attach qualifications and CVs of the Project Team Members)</b></p> <p><b>2.1. Relevant experience of SCM Practitioner in the field of SCM Policy review = (20)</b></p> <ul style="list-style-type: none"> <li>• 10 years and above = <b>20</b></li> <li>• 7 – 9 years = <b>10</b></li> <li>• 4 – 6 years = <b>5</b></li> <li>• 0 – 3 years = <b>2</b></li> </ul> <p><b>2.2. Relevant qualification of SCM Practitioner = (20)</b></p> <ul style="list-style-type: none"> <li>• Postgraduate in Supply Chain Management = <b>20</b></li> <li>• Honours in Supply Chain Management = <b>15</b></li> <li>• Bachelor of Commerce in Supply Chain Management = <b>10</b></li> <li>• Degree in Supply Chain management = <b>5</b></li> </ul> <p><b>NB: The initial project manager need not change during the course of the project without prior approval of the ETDP SETA.</b></p>	<b>40</b>
3.	<p>Project implementation plan <b>in accordance with the required Scope of Work, 3.1.,</b> must include all the listed requirements:</p> <ul style="list-style-type: none"> <li>• Meets <b><u>ALL</u></b> of the requirements as stipulated in the Scope of Work= <b>20 points</b></li> </ul>	<b>20</b>

The information in this communication is confidential and may be legally privileged. It is intended for the sole use of the individual/s or entity to whom this has been addressed or copied. If you are not the intended recipient you are hereby notified that any disclosure, copying, distribution or taking action in reliance of the contents of this communication and/or its attachments, is strictly prohibited and will be unlawful.

	<ul style="list-style-type: none"> <li>Does not meet all the requirements as stipulated in the Scope of Work = 0 points</li> </ul>	
<b>TOTAL</b>		<b>100</b>

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

Points will be awarded on a sliding scale only where indicated.

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

### 6.3. STAGE 3 [Folder B (USB)]

#### PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. Submit a "Unique security personal identification number (PIN) issued by SARS" **which the SETA will use to verify the bidder's tax matters prior to the award**
- c. Invitation to Bid - **SBD1**
- d. Declaration of Interest – **SBD 4 (New)**
- e. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 - **SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals**
- f. B-BBEE certificate or sworn affidavit (**If claiming preferential points**) – **this will be used to verify points to be allocated for specific goals.**

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

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

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

## 7. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

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

## 8. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website, [www.etdpseta.org.za](http://www.etdpseta.org.za), Main Menu > Supply Chain Management > Open RFQs and will be sent to suppliers from CSD as from **12h00** on **08 December 2023**.

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

**Folder B - (Financial Proposal)** Costing Model (*Price must be final, include VAT and signed*), Submit a "*Unique security personal identification number (PIN) issued by SARS*" **which the SETA will use to verify the bidder's tax matters prior to the award**, Invitation to Bid - **SBD1**, Declaration of Interest – **SBD 4 (New)**, Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 -**SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals** and B-BBEE certificate or sworn affidavit (*If claiming preferential points*) – **this will be used to verify points to be allocated for specific goals**.

All Bids/Proposals (completed in [one (1) USB] must be **courier or hand delivered to:**

The ETDP SETA – Head Office  
ETDP SETA House  
2-6 New Street  
Ghandi Square  
Johannesburg South - CBD  
2091

OR

Sent via email to [TienieJ@etdpseta.org.za](mailto:TienieJ@etdpseta.org.za) or [etdpsetarfq@etdpseta.org.za](mailto:etdpsetarfq@etdpseta.org.za)

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00** on **14 December 2023**.

**No late submission will be accepted!**

## 9. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00** on **14 December 2023**.

## 10. CONTACT PERSON

**NO** telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. **ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID.** All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain Management: Email: [TienieJ@etdpseta.org.za](mailto:TienieJ@etdpseta.org.za) or [SibusisoK@etdpseta.org.za](mailto:SibusisoK@etdpseta.org.za)

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