

HEAD OFFICE
Hosken's House
45 Mooi Street
Johannesburg
2091
Private Bag X105
Melville, 2109
Tel:(011) 372 3300

EASTERN CAPE
Waverley Office Park
3 - 33 Philip Frame Road
Chiselhurst
East London, 5200
Tel: (043) 726 8314
Fax: (043) 726 8302

FREE STATE
Motheo TVET College
National Artisan Academy
R657+P3, Ehrlich Park
Bloemfontein, 9312
Tel: (051) 430 5072
Fax: (051) 430 5080

GAUTENG
112 Main Street
9th Floor
Marshalltown
Johannesburg CBD
Tel: (011) 403 1301/2/3/6
Fax: (086) 614 8781

KWAZULU-NATAL
Kent House
1 Neptune Road
Westville
Durban, 3629
Tel: (031) 304 5930
Fax: (031) 301 9313

LIMPOPO
89B Biccard Street
Polokwane
0700
Tel: (015) 295 9303
Fax: (015) 295 9301

MPUMALANGA
Streak Office Park
6 Streak Street
Block B, 1st Floor
Nelspruit, 1201
Tel: (087) 352 7108
Fax: (013) 752 2917

NORTHERN CAPE
Montrio Corporate Park
Monument Heights
10 Oliver Road
Kimberly
Tel: (053) 832 0051/ 2
Fax: (053) 832 0047

NORTH WEST
Sparkling Office Park
78 Retief Cnr Peter
Mokaba Street
Potchefstroom, 2531
Tel: (018) 294 5280
Fax: (018) 294 5719

WESTERN CAPE
Sunbel Building
2 Old Paarl Road
Office 205, 2nd Floor
Belville, 7530
Tel: (021) 946 4022
Fax: (021) 946 4043



Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 58 - 2024/25

REQUEST FOR QUOTATION

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT RAPID EVALUATION STUDY 2024/25

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 ETD sector.

As result of the 7th Administration's Government of National Unity introduction of its Medium Term Strategic Development Plan (MTDP), the GNU, the ETDP SETA is mandated to review its 2024/25 Annual Performance Plan (APP) to APP to align with the new MTDP strategic priorities, It of for this reason that the ETDP SETA wishes to appoint a suitable qualified service provider to conduct a rapid study to assess the completion and dropout rate of unemployed learners that were enrolled in various ETDP SETA funded skills development interventions in particular bursaries.

The table below represents the break-down of estimated numbers of beneficiaries who entered these interventions in the respective years.

Intervention	2020/21	2021/22	2022/23	2023/24	2024/25 ¹
	Entered	Entered	Entered	Entered	Entered
Internships	3 034	865	1 505	967	1 100
Learnerships	-	-	200	503	500
WIL for TVET college students	354	509	1 303	1 307	1 500
WIL for HEIs students	-	-	636	755	1 200
Bursaries	605	1258	622	861	350

¹ These are the projected enrolments and completions for 2024/25

2. PURPOSE & OBJECTIVES

2.1. PURPOSE OF THE PROJECT

The study seeks to rapidly assess the completion and dropout rates.

2.2. OBJECTIVES OF THE STUDY

The study should therefore address the following related objectives:

- i. To gather data to help determine priorities, identify emerging problems and trends and to enable decision making to either support project adjustments or support full-scale evaluation.

2.3. SPECIFIC EVALUATION QUESTIONS

The study seeks to answer the following specific questions:

- i. To what extent are completion rates and reasons?
- ii. To what extent are dropout rates and reasons?
- iii. What projects can be replicated or scaled-up in the future and why?

3. PROJECT SCOPE AND REQUIREMENTS

3.1. PROJECT SCOPE

The scope of the study focuses on learners enrolled from 2020 to date to ascertain drop out and completion rates.

3.2. REQUIREMENT OF THE SERVICE PROVIDER(S)

The evaluation team should be comprised of the following:

- i. Project manager/s – at least 5 years' relevant experience in project management, 3 years of which are in evaluations, plus a post graduate degree preferably a master's degree.
- ii. Evaluation specialist/s - at least 3 years' experience in evaluations, plus a postgraduate degree, preferably master's degree.
- iii. Sector specialist/s – an honours degree plus at least 3 years' experience in skills development within the education, training, and development sector.

The team should possess the following core competencies:

- i. Contextual knowledge and understanding of the SETA programmes, strategic planning and implementation.
- ii. Project management
- iii. Evaluation discipline and practice
- iv. Research practice.
- v. Report writing and communication.
- vi. Excellent communicating skills.

NB: CVs of the above team members must be submitted with proof of appropriate qualifications and will form part of the bid evaluation criteria.

3.3. METHODOLOGY

The study will apply a mixed methods approach which will include:

- i. Desktop review and in-depth analysis of the ETDP SETA documentation and data including annual performance reports, programme documents, programme data, and annual performance reports, which will build good understanding of information available.
- ii. Interview and survey key informants such as the ETDP SETA programme managers, provincial managers, employers in the sector, training providers and beneficiaries.
- iii. A two-day stakeholder workshop and meetings ETDP SETA projects team.

3.4. PROJECT DELIVERABLES

As part of the project deliverables, the successful evaluator(s) will be required to produce and submit the following:

- i. A brief (no longer than 5 working days) scoping exercise to review the state of the seta's programme data and data systems, as well as identification of key stakeholders.
- ii. Compile an inception report with a detailed evaluation plan, which is to be presented to and approved by the evaluation task team.
- iii. Convene a one-day debriefing workshop with key programme stakeholders (to be identified by the seta's evaluation specialist).
- iv. Design and test data collection instruments for survey and telephone interviews for approval by the evaluation task team.
- v. Submit both the draft (preliminary) and final evaluation reports for approval by the task team. The format of the report will be provided by the seta. The final report shall be accompanied by all necessary annexures including approved instruments, identity protected raw data etc.
- vi. Present a preliminary and final evaluation reports to fora as shall be dictated and negotiated between the ETDP SETA evaluation task team and the evaluator(s). This remains an option for the SETA for as long as the evaluation contract is still open.
- vii. A metadata should accompany any datasets produced including clarification on the following: format of the data, description of the data, data structure, variables, data quality issues, non-responses, coding issues, and derived variable.

3.5. PROPOSAL REQUIREMENT

The prospective service provider must submit proposal that entails the following:

- i. Understanding of the interventions to be evaluated, the ToRs and the socio-economic context within which the interventions are implemented.
- ii. Evaluation approach, design and methodology for the evaluation including literature and documentation review, research design, procedures/methods for data collection, storage, processing and analysis procedures, suggestions for elaboration and examples of examples of evaluation questions etc.
- iii. Activity based evaluation plan with budget, clear timelines and responsibilities.
- iv. Proof of competence in a form of qualifications and a list of related projects undertaken in the past with contact people with contact details as references.
- v. Project management measures.
- vi. Risks and mitigation measures.

3.6. PROJECT MILESTONES AND PAYMENT SCHEDULE

The bidder must outline the milestones/deliverables and payment schedules in their proposal.

3.7. BUDGET

The bid proposal should clearly indicate the total price in South Africa rand, inclusive of VAT. The payment of the appointed service provider will be according to the proposed payment schedule and will be based on the actual quoted price.

3.8. REQUIREMENTS FOR PERSONNEL

The key evaluation team should comprise:

Role	Qualification	Experience
Project manager	Post-graduate, preferably a master's degree	at least 5 years' relevant experience in project management and at 3 years in evaluations
Evaluation specialist	Post-graduate, preferably a master's degree	at least 3 years' experience in evaluations,
Sector specialist	Postgraduate, preferably an honour' degree	at least 3 years' experience in skills development within the education, training, and development sector.
The project team should possess the following core competencies		
- Contextual knowledge and understanding - People skills - Project management skills - Evaluation discipline and practice - Research practice - Report writing and communication. - excellent communicating skills		

4. COSTING MODEL (PRICING SCHEDULE)

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

The service provider must submit an itemised budget proposal, clearly indicating the cost per unit.

COSTING REQUIREMENTS			
NAME OF BIDDING ORGANISATION:			
ITEM DESCRIPTION	UNIT COST	AMOUNT	COMMENTS
Labour costs			
Subsistence and communication related costs			
Project management and overheads (25%)			
Transportation costs			
Total project budget			
Detailed activity-based labour budget e.g.			
Inception and scoping Meeting			
Monthly meetings and working sessions			
Document analysis and literature review			
Inception report writing			
Sampling strategy and instrument design			
Data collection and analysis			
Interpretation of the results			
Quality assurance and risk mitigation			
Report writing			
Presentation of study results			
Other			
TOTAL LABOUR COSTS			
VAT @15%			
TOTAL COSTS			
ALL COSTS MUST BE INCLUSIVE OF VAT			

NAME OF BIDDER: _____

POSITION/ ROLE: _____

SIGNATURE: _____

All pricing shall be in South African Rand (ZAR). All project milestone with costing should be listed on the pricing schedule.

5. DURATION

The successful service provider will be required to enter a formal contract with the ETDP SETA by signing a Service Level Agreement (**SLA**). The contract will become effective on the date of last signature and will be initiated through a commencement meeting between the two parties. The contract period shall not exceed **three (3) months** from the date of project commencement.

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.

Note: Folder A (USB) must have documents for Stage 1

6.1. STAGE 1 [Folder A (USB)]

In this stage, the evaluation of bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid document.

- a. The minimum qualifying score for functionality will be **70 points** out of hundred **(100) points** and bids that fail to achieve the minimum qualifying score will be eliminated.
- b. Only bids that achieved the minimum qualifying score/percentage 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 below:

NO	QUALIFYING CRITERIA FOR SHORT LISTING	POINTS
1.	Organisational Experience & Expertise: Proof of 5 yrs experience in similar evaluations. A minimum of 3yrs project management experience linked to contactable business references attached. 1.1. Contactable references: (12) i. Three (03) or more reference letters submitted = 12 points ii. Two (02) reference letters submitted = 7 points iii. One (01) reference letter submitted = 3 points 1.2. Experience in conducting similar evaluations and project management: (12) i. Five (05) years or more = 12 points ii. Three (03) – Four (04) years = 7 points iii. One (01) – Two (2) years = 3 points *Each reference letter must clearly indicate: ▪ <i>Be on the client's letterhead,</i> ▪ <i>Name of the project,</i> ▪ <i>Nature of similar service rendered,</i> ▪ <i>Confirm the status of project (s) [Current or Completed],</i> ▪ <i>Have recommendations and contact details, and</i> ▪ <i>Be signed.</i> <i>NB: Reference letters must be on a company letter head, signed and dated, otherwise they cannot be considered.</i>	24
2.	Capacity of the project team and experience: 36 2.1. Project manager with 3yrs project management experience and 5yrs evaluations experience: (6) i. Five (5) years or more = 6 points ii. Three (3) – Four (4) years = 3 points iii. One (1) – Two (2) years = 2 points 2.2. Qualifications of a Project Manager: (6) ▪ Master's Degree or equivalent = 6 points ▪ Honour's Degree or equivalent = 3 points 2.3. Experience of Evaluation Specialist: (6) i. Three (3) years or more = 6 points ii. Two (2) years = 3 points iii. One (1) year = 2 points	36

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	2.4. Qualifications of an Evaluation Specialist. (6) ▪ Master's Degree or equivalent = 6 points ▪ Honour's Degree or equivalent = 3 points 2.5. Experience of Sector Specialist in skills development sector: (6) i. Three (3) years or more = 6 points ii. Two (2) years = 3 points iii. One (1) year = 2 points 2.6. Qualifications of a Sector Specialist. (6) ▪ Honours Degree or equivalent = 6 points ▪ Batchelor's Degree or equivalent = 3 points <i>*Note: No changes should be made to the team in the middle of the project without prior consultation with the ETDP SETA.</i>	
3.	Technical proposal of the project: 40 1. Understanding of the task and responsiveness to the ToRs 2. Demonstration of broader understanding of the ETD 3. Research methodology: including research strategy and design, data collection, data processing and data analysis plan, study limitations and study 4. Allocation of resources 5. Project deliverables with realistic milestones and timeframes. 6. Risks and mitigation strategies Points allocation: ▪ 7 criteria met = 40 points ▪ 6 or less criteria met = 0 points	40
TOTAL		100

Submission of quotations must be accompanied with documents to justify awarding the above points, and as such include details of contactable references to validate the information submitted. Please take note of the value and scoring point system of your bid.

6.2. STAGE 2 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- i. Costing Model (*Price must be final, include VAT and signed*)
- ii. 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
- iii. Invitation to Bid – **SBD 1**
- iv. Declaration of Interest – **SBD 4 (New)**
- v. 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
- vi. 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 | 80 |
| ✓ Allocation of specific goals | 20 |

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 reserves the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned or submitted by facsimile will **NOT** be accepted.
5. Bidders with a **turnover above R 10 million** must submit a valid certified B-BBEE Verification Certificate from **SANAS Accredited Verification Agency** in order to be used to verify eligibility for allocation of points for specific goals.
6. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less to be used to verify eligibility for allocation of points for specific goals.
7. A Qualifying Small Enterprise (QSE) is required to submit a sworn affidavit confirming their **annual total revenue of between R 10 million and R 50 million** and **level of black ownership** or a B-BBEE level verification certificate to be used to verify eligibility for allocation of points for specific goals.
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 used to verify eligibility for allocation of points for specific goals. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that no points will be allocated for specific goals.
10. Bids submitted are to hold good for a period of 90 days.
11. 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.
12. All suppliers must be registered on the **Central Supplier Database**. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier.
13. Companies that are in the process of **de-registration in the CIPC** will not be considered.
14. The successful research chair **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.
15. 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, Main Menu > Supply Chain Management > Open RFQs and on National Treasury E-portal as from **12h00** on **23 September 2024**.

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
HOSKEN'S House
45 Mooi Street
Johannesburg South - CBD
2091

OR

Sent via email to: 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 **08 October 2024**.

No late submission will be accepted!

9. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before 11h00 on **08 October 2024**.

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 Manager: Email: etdpsetarfq@etdpseta.org.za

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

ANNEXURE A

Bidders are required to provide references for Project Manager, Evaluation Specialist and Sector Specialist.
Failure to provide references will lead to no points being allocated.

1. RELEVANT EXPERIENCE FOR THE PROJECT MANAGER

Name of Project Manager: _____

Project/Company name	Position/Role	Responsibilities	Start date	End date	Reference (Name & Surname)	Reference (Position)	Reference (Contact details)

2. RELEVANT EXPERIENCE FOR THE EVALUATION SPECIALIST

Name of Evaluation Specialist: _____

Project/Company name	Position/Role	Responsibilities	Start date	End date	Reference (Name & Surname)	Reference (Position)	Reference (Contact details)

3. RELEVANT EXPERIENCE FOR THE SECTOR SPECIALIST

Name of Sector Specialist: _____

Project/Company name	Position/Role	Responsibilities	Start date	End date	Reference (Name & Surname)	Reference (Position)	Reference (Contact details)