

TERMS OF REFERENCE

For the provision of technical services to the Jobs Fund by serving on the Technical Evaluation Committee (TEC) – Development Finance Specialist

PN558

Programme Identification

Name of Client	The Jobs Fund
Reference Number	PN558
Name of Sub-Project	Appointment of Technical Evaluation Committee (TEC) members (x1)
Contracting Authority	Government Technical Advisory Centre (GTAC), National Treasury
Accountable Officer	Ms. Najwah Allie-Edries
Project Purpose	Provision of technical services to the Jobs Fund by serving on the Technical Evaluation Committee – Development Finance Specialist

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1. BACKGROUND INFORMATION

Established in 2011, the Jobs Fund is a sub-programme (Employment Facilitation) of the National Treasury, the purpose of which is to support inclusive employment growth. It is a multi-year R9 billion matching grant facility.

The objective of the Jobs Fund is to co-finance innovative public, private and non-state sector initiatives that will significantly contribute to job creation. The Jobs Fund operates on challenge fund principles as a catalyst for innovation and investment in new ways of working that directly contribute to long-term sustainable employment creation.

Globally, challenge funds have emerged as an effective and versatile financing mechanism with which to channel public money to catalyse pro-poor innovation and investment in emerging markets and to provide profitable ways of improving market access for the poor. In practice, challenge funds are highly versatile and can be deployed across a variety of contexts and sectors, targeting a range of outcomes from financial education to enterprise-linked poverty reduction and 'pro-poor' growth.

The ultimate development goal of a challenge fund is, through a finite intervention period, to stimulate a long-term change in the way that local supply chains and market systems work to overcome cost, technology, financial, etc. barriers which may have excluded poor producers and households in the past. Systemic change in the way that market systems work is typically the desired outcome of a challenge fund and is the product of a coincidence of factors (new technology, an environment conducive to investment, innovative private investors, etc.).

The Jobs Fund supports partners in piloting innovative approaches to sustainable job creation through four funding windows, namely, Enterprise Development, Support for Work-seekers, Infrastructure and Institutional Capacity Building. The Jobs Fund accepts applications from the private, public and non-state sectors during calls for proposals, and project partners are required to share both risk and costs by matching the grant allocation, generally on a ratio of 1:1.

As of 01 October 2014, the Jobs Fund was located within the Government Technical Advisory Centre (GTAC), an entity of the National Treasury that provides administrative support to the Jobs Fund.

The main objective of the Technical Evaluation Committee is to during a call for proposals to conduct initial screening and appraisal of grant applications. The assessment is made against the Jobs Fund investment criteria, which include, amongst others, consideration of whether the application is demand-led, potential for sustainable job creation, innovation, value for money and economic sustainability of the proposal beyond the grant.

2. PURPOSE

The purpose of these Terms of Reference is to contract with one (1) individual with the requisite technical expertise in development finance and structured finance to independently assist the Jobs Fund-GTAC in assessing grant applications. Individuals' services will be requested based on their respective areas of expertise, and alignment will be sought with specific calls for proposals.

3. TECHNICAL EXPERTISE REQUIRED

The technical expertise required ranges across economic sectors while accommodating specific sectors that may be the focus of a funding round. Generally, the required areas of expertise include:

3.1 Areas of Expertise

- i. Social Impact Investment
- ii. Challenge Funds
- iii. Development Finance
- iv. Structured Finance

3.2 Economic Sector Expertise, including:

- i. Agriculture
- ii. Tourism
- iii. Manufacturing
- iv. Digital Economy
- v. Social Economy
- vi. Informal Economy
- vii. Creative Sector
- viii. Care work
- ix. Construction
- x. Waste Management
- xi. Repair and Maintenance services

4. RESPONSIBILITIES AND FUNCTIONS

The Technical Evaluation Committee shall be responsible for the following matters:

4.1 Assessment of Funding Proposals

- i. The consideration and assessment of proposals submitted to the Jobs Fund during a call for proposals, against the funding criteria of each call for proposals.

- ii. Provide technical feedback on the applications presented at the committee meetings.
- iii. Each TEC member is expected to provide guidance and recommendations to assist in the development of a sound proposal for submission to the Jobs Fund Investment Committee. The TEC members may also direct the Jobs Fund PMO to obtain additional information or clarification on proposals being considered, where it is warranted.
- iv. Make recommendations to the Jobs Fund Investment Committee on whether to approve or not approve the application.
- v. Take instruction/follow-up on requests from the Jobs Fund Investment Committee.

5. MEETINGS

5.1 Frequency and Attendance

- i. The TEC shall meet as and when required:
 - a) A schedule of meetings approved by the TEC will be issued to all members of the TEC for each Funding Round.
 - b) Special meetings of the TEC shall be arranged by consultation between the Chairperson of the TEC and the TEC Secretariat.
 - c) All TEC members should attend meetings – in person or on the specific electronic platform
 - d) Members who are unable to attend shall, in advance, advise the TEC Secretariat.
 - e) The TEC shall not be required to meet, should there not be a funding round during a particular financial year.
 - f) Depending on the nature of the funding round, TEC members' inputs for proposals might be solicited remotely as and when required, or members may be asked to provide inputs into management appraisal meetings.

6. LOGISTICS AND SCHEDULE OF THE ASSIGNMENT

6.1 Facilities to be provided by the Service Provider

The service provider will be responsible for the following:

- IT (laptops, etc.).
- All mobile communications (voice and data).
- Meetings will either take place in a predetermined venue (Jobs Fund offices in Gauteng) or on a specific electronic platform.

6.2 Sub-Contracting

The work that the service provider will be contracted to do shall not be subcontracted.

6.3 Time Frame

The appointment period will be for a period up to 31 March 2026.

The estimated time requirement during this period is calculated at twelve days (8 hours per day).

The time allocated would be utilised as follows:

- Attendance of meetings (actual time taken for the completion of the meeting in which the member would have attended)
- Meeting preparation and review of project applications, i.e. maximum of eight (8) hours for preparation time per meeting,
- Provision of technical inputs
- Additional inputs for Management appraisal meetings

7. SUBMISSION REQUIREMENTS

Applicants are required to indicate the following:

1. An hourly **rate** inclusive of VAT (if applicable), not exceeding R1,200.00 (one thousand two hundred Rand).
 - a. An allocation for disbursement must be provided if an individual is travelling from outside Gauteng.
2. An indication of whether the bidder is contracting **individually or through a company**.
3. A comprehensive **Curriculum Vitae (CV)**. CVs should reference the specific experience and expertise sought by the Jobs Fund, as stipulated in the Evaluation Criteria below;
4. **a copy of the highest qualification**; and
5. **Proof of membership** of a professional body (where required, e.g. admitted attorneys etc.)
6. Organisations **submitting CVs on behalf of their employees** should submit no more than two (2) CVs. If an organisation submits more than 2 CVs, only the first two CVs in the pack shall be considered for evaluation.

8. EVALUATION CRITERIA

GTAC has set minimum standards that bidders must meet to be selected as the successful bidder.

The successful bidder will be awarded the contract for the **above** duration of the service requirements and will be selected based on the following three-phase process:

8.1 Evaluation Phases/Methodology

Table 1: Evaluation Phases

Evaluation Stage	Description
Phase 1	<p>Stage 1A: Administrative Compliance – Non-Disqualifying</p> <p>A bidder is required to submit the administrative compliance documents as referred to in paragraph 8.1.1.</p> <p>Stage 1B: Mandatory Compliance – Disqualification/ Pre-Qualification</p> <p>Failure to submit any of the required mandatory documents will lead to disqualification. Refer to paragraph 8.1.2.</p>
Phase 2	<p>Technical Evaluation: Desktop Evaluation</p> <p>Bidders must submit information as per the Bid Submission Requirements. The submitted technical proposal must respond to the Technical Evaluation criteria cited in these Terms of Reference.</p> <p>The Technical proposal will be evaluated out of 100% with a Threshold of 70%.</p> <p>Only bidders who meet the threshold will be considered for the Price and Specific Goals evaluation.</p>
Phase 3	<p>Price and Specific Goals</p> <p>Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 8. Bidders must provide the required information for evaluation purposes.</p>

It should be noted that the stages are considered to be separate processes. These three phases are mutually exclusive and will be treated as such in the appraisal.

8.1.1 Stage 1a: Administrative Compliance (Non-Disqualification)

During this phase, bid documents will be reviewed to determine compliance with tax matters and the Central Supplier Database (CSD) at the closing date and time of the bid. Bidders must submit all returnable documents as outlined in the table below using the designated electronic e-procurement system

Table 2: Bid requirements compilation and submission:

Document to be submitted	Requirement
SBD 1- Invitation to Bid	Complete the supplied pro forma document on the e-procurement system.

Document to be submitted	Requirement
SBD 4 - Bidder's Disclosure (Refer to note below)	Complete the supplied pro forma document on the e-procurement system.
Note: Bidders must complete the SBD 4 document as provided on e-procurement. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form: - "Person" means a bidder or supplier or shareholder, director, trustee, partner, or member of a bidder or supplier having the controlling interest in the bidder or supplier. - "State" means a national or provincial department, a national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament	
SBD 6.1 - Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022.	Complete the supplied pro forma document on the e-procurement system i.e SBD 6.1 and Specific Goals tab as provided on the e-procurement system. Failure to complete the SBD 6.1 will result in the bidder forfeiting points for specific goals.

Tax Clearance Status

A valid tax PIN / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Where consortium/joint ventures/sub-contractor is involved, each party to the association must submit a separate validation of Tax status and CSD registration number. Bidder's tax matters must be compliant at the time of award. In the case where a bidder's tax matters are non-compliant, a bidder will be given a maximum of seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

No tender shall be awarded to a bidder whose tax affairs are not in order.

GTAC reserves the right to withdraw an award made or cancel a contract concluded with a successful bidder in the event that it is established that such bidder was not tax compliant at the time of the award.

GTAC further reserves the right to cancel a contract with a successful bidder if such bidder does not remain tax compliant for the full term of the contract.

8.1.2 Stage 1b: Mandatory Compliance (Disqualification)

Bidders must submit a responsive proposal in accordance with these terms of reference and below the minimum prequalification requirements. Failure to adhere to any of these requirements will result in disqualification:

- a. Bidders must be registered on the Central Supplier Database (CSD) on the closing date of the Request for Quotation (RFQ).
- b. Submission of a technical proposal is required. A bidder is required to submit no more than two (2) CVs. If a bidder submits more than 2 CVs, only the first two CVs in the pack shall be considered for evaluation.
- c. Submission of a price/financial proposal is required as per SBD 3.3, and must be completed as indicated in the e-procurement portal
- d. Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered. i.e., in the event that a bidder representative is in the employ of the state, such a bid proposal will not be considered.

8.1.3 Phase 2: Desktop Evaluation

- a. Bids will be evaluated strictly in accordance with the bid evaluation criteria stipulated in this ToR.
- b. In a case where there is a difference between the contents of this ToR and the e-procurement system, the ToR takes precedence.
- c. Proof of Qualifications: Bidders must upload qualification certificates as well as all required certificates. Certified copies will be requested in the event that the bid is successful and before a framework agreement can be concluded.
- d. Please note that a Certificate of Membership shall not be deemed as proof of educational qualification (Education qualifications refer to certifications issued by an institution of higher learning e.g., certificate, diploma, degree, etc.)
- e. Non-submission of qualifications will lead to a score of zero for the qualifications technical criterion.
- f. All international qualifications must be accompanied by South African Qualifications Authority (SAQA) Accreditation.
- g. Non-submission of SAQA confirmation will lead to a score of zero for the qualification's technical criterion.

- h. A maximum of two (2) CVs will be evaluated per bid. If more than two CVs are submitted per bid, the first two (2) CVs that appear in the bid will be evaluated.

In addition to the proposal, the bidder is expected to submit the following:

Table 3: Submission Requirements

No.	SUBMISSION REQUIREMENTS
1.	Team Experience Matrix, clearly showing the experience of proposed individual/team members as per the stipulated requirements (this must be in section 4.1 of the CV template).
2.	Resource Matrix, clearly showing the role and qualification of each team member for the completion of the project (this must be in section 4.2 of the CV template).

The Desktop Evaluation criteria are discussed in Table 4 below.

Each proposed individual will be evaluated independently in a case where more than 1 CV is submitted. All proposals would be evaluated on the following criteria:

Table 4: Evaluation Criteria

No.	Evaluation Criteria	Scoring Criteria	Weight %
1	Qualification <ul style="list-style-type: none"> Highest Qualification (in areas of commerce; law; technology; engineering or social sciences) <i>Where qualifications are not submitted, or qualifications are not in the relevant field as mentioned above, a score of 0 will be awarded.</i>	5 = Post Graduate degree (NQF 8 or higher) 4 = Bachelor's Degree (NQF 7) 3 = National Diploma (NQF 6) 2 = National Certificate (NQF 5) 1 = Matric 0 = non-submission of qualifications or qualifications are not in the relevant area as specified.	10
2	General Experience <ul style="list-style-type: none"> Number of years of experience in the following areas: <ul style="list-style-type: none"> Assessment of development projects. Use of financial instruments and financial structuring of development projects. <i>Applicant to clearly mark "General Experience" in the Team Experience Matrix in the CV.</i>	5 = > 10 years combined experience in one or more of the specific areas 4 = 8 - 9 years combined experience in one or more of the specific areas 3 = 5 - 7 years combined experience in one or more of the specific areas 2 = 2 - 4 years combined experience in one or more of the specific areas 1 = < 2 years combined experience in one or more of the specific areas 0 = No relevant or related experience.	25

No.	Evaluation Criteria	Scoring Criteria	Weight %
3	Technical Experience <ul style="list-style-type: none"> Number of years of experience in the areas listed in section 3.1 <i>Applicant to clearly mark “Technical Experience Criteria” in the Team Experience Matrix in the CV</i>	5 = > 10 years combined experience in one or more of the specific areas 4 = 8 - 9 years combined experience in one or more of the specific areas 3 = 5 - 7 years combined experience in one or more of the specific areas 2 = 2 - 4 years combined experience in one or more of the specific areas 1 = < 2 years combined experience in one or more of the specific areas 0 = No relevant or related experience	40
4	Expertise <ul style="list-style-type: none"> Economic Sector Expertise in the sectors listed in section 3.2. <i>Applicant to clearly mark “Expertise Criteria” in the Team Experience Matrix in the CV.</i>	5 = > 10 years combined experience in one or more of the specific areas 4 = 8 - 9 years combined experience in one or more of the specific areas 3 = 5 - 7 years combined experience in one or more of the specific areas 2 = 2 - 4 years combined experience in one or more of the specific areas 1 = < 2 years combined experience in one or more of the specific areas 0 = No relevant or related expertise.	25
TOTAL TECHNICAL POINTS			100
MINIMUM THRESHOLD			70%

Only bidders that meet the 70% threshold will be considered for the Price and Specific Goals evaluation in terms of the Preferential Procurement Regulation (PPR) 2022.

8.1.4 Phase 3: Price and Specific Goals Evaluation

- The Preferential Procurement Evaluation will be based on the 80/20 principle.
- The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for the price as allocated in the enclosed form SBD 6.1. which must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in Table 5 below.
- Submission of a price proposal is required in the proforma format. (SBD 3.3). Bidders need to provide the cost per output, inclusive of VAT.
- GTAC reserves the right to negotiate the price offer or rates with the recommended bidder(s).

Table 5: Price and Specific Goals Evaluation Criteria

Number of points allocated (80/20 system)	
Price	80
The specific goals allocated points in terms of this tender	20

Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10
Women percentage of ownership: 30% and above	10
Total Points	100

The CSD report shall be used as evidence to confirm/award points for specific goals. It is the responsibility of the bidding entity to ensure that the information on the CSD is updated.

Table 6: Definitions

Terminology	Definition
“Specific Goals”	means specific goals as contemplated in section 2(1)(d) of the Act, which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability, including the implementation of programmes of the Reconstruction and Development Programme as published in <i>Government Gazette</i> No. 16085 dated 23 November 1994;
Historically Disadvantaged Individual (HDI)	means a South African citizen: <ol style="list-style-type: none"> 1. who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the Republic of South Africa, 1993, (Act No 200 of 1993) (“the interim Constitution); and/or 2. who is a female; and/or 3. who has a disability. provided that a person who obtained South African citizenship on or after the coming into effect of the Interim Constitution is deemed not to be an HDI;

9. FINANCIAL IMPLICATIONS

The service provider may be required to attend meetings at Jobs Fund offices in Gauteng when deemed necessary by the Jobs Fund, which will not form part of travel disbursements. The quotation should be inclusive of all travel-related costs.

All quotations would need to specify the deliverables to be completed, time allocated to each deliverable and cost implications (please include price proposal as per SBD 3.3).

10. CONTRACTING AUTHORITY

The Contracting Authority will be the Government Technical Advisory Centre (GTAC).

11. OTHER BID CONDITIONS

Prior to the appointment, the recommended service provider may be required to submit additional supporting documentation.

GTAC reserves the right to negotiate the final offer with the recommended bidder before the award.

12. BID VALIDITY PERIOD

The RFQ will be valid for sixty (60) days from the closing date of the RFQ.

13. LEGAL IMPLICATIONS

The successful service provider must be prepared to enter into a service-level agreement with GTAC.

14. CLARIFICATIONS

Requests for clarification must be made in writing by e-mail. Telephonic enquiries for clarification will not be accepted.

Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.

15. COMMUNICATION

GTAC's Professional Services Procurement (PSP) unit will only communicate with bidders by email where bid clarity is sought, to obtain information or to extend the validity period. For any enquiries, email: psp@gtac.go.za. The submission reference must be included in the subject line of the email. GTAC will only respond to email communication during business hours.

Alternatively, contact the e-procurement portal support desk at:
<https://vendorportal.gtac.gov.za/Contact>.

Any communication by the bidder (either by facsimile, letter, electronic mail or any other form of correspondence) to any government official, representative, or a person acting in an advisory capacity for GTAC in respect of this bid between the closing date and the award of the bid is prohibited.

16. COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the Information to bid by bidders will result in invalidation of such bids.

17. PROHIBITION OF RESTRICTIVE PRACTICES

In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/ are or a contractor(s) was/were involved in:

- a. Directly or indirectly fixing a purchase or selling price or any other trading condition.
- b. Dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
- c. Collusive bidding.
- d. If a bidder(s) or contractor(s), in the judgment of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

18. BENEFICIAL OWNERSHIP

The bidder/s are required to provide the information below for transparency.

- a. A beneficial owner of a company is an individual who, directly or indirectly, ultimately owns that company or exercises effective control over that company.
- b. Companies are required to keep a register of their beneficial owners and to provide this information to the Companies and Intellectual Property Commission (CIPC). The CIPC maintains a central register of beneficial ownership information.
- c. The beneficial ownership regime in South Africa is intended to improve transparency and accountability in the corporate sector. It is also intended to help prevent money laundering and terrorist financing.
- d. Companies are required to keep a register of their beneficial owners and must disclose in their bids the following information, as provided for in their register for the information of each beneficial owner:
 - Name
 - Date of birth

- Identity number or passport number
- Residential address
- Occupation
- Nature and extent of control over the company

19. SUBMISSION DETAILS

To respond to this tender, bidders are required to register on the GTAC e-procurement system, using the following link: <https://vendorportal.gtac.gov.za/>

The registration process involves the following steps:

- Register as a portal user. This is the process of creating a user account on the vendor portal/e-procurement system. This will allow the user to view and respond to tenders.
- Capture the supplier details. Registering the company details allows the bidder to enter information and upload documents.

To respond to this tender:

- Log in to the portal <https://vendorportal.gtac.gov.za/>
- Navigate to the tender menu.
- Select “Formal” and click on “Current”.
- A list of available tenders will be available, and the bidder to select the tender number (e.g. TENxxxxx) to start the submission process.

Detailed instructions on how to register on the e-procurement system are available at (<https://docs.corelab.co.za/Home/ViewContent?productid=1§ionid=2&contentid=1165>)

The capturing process is in the form of a wizard, with the system guiding you through each step. Once all the required information is completed, remember to submit your bid. Only submitted bids will be eligible for the award.

NB: Only electronic submission of bids on the GTAC e-procurement system is allowed. Do not submit hard copy bids to GTAC as these will not be considered.

NB: Submissions received after the closing date and time will not be accepted.

For any enquiries, email: psp@gtac.gov.za or contact the vendor support desk at:

<https://vendorportal.gtac.gov.za/Contact>.

20. NON-COMPULSORY BRIEFING SESSION

No briefing session is required

21. CONTACT DETAILS

Professional Services Procurement,

3rd Floor at GTAC: room GL03.44

Private Bag X 115, Pretoria, 0001

Physical address: GTAC, 40 Madiba Street (Vermeulen), Pretoria.0001 For

any enquiries, email: psp@gtac.gov.za