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RFQ NO: SCMU NO: 56 - 2025/26

REQUEST FOR QUOTATIONS

TERMS OF REFERENCE FOR THE APPOINTMENT OF AN ACCOUNTING FIRM TO RENDER ACCOUNTING SERVICES TO 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 ETD sector.

The ETDP SETA will host a **NON- COMPULSORY** virtual briefing session for **RFQ NO: 56 - 2025/26 –Terms of reference for the appointment of an accounting firm to render accounting services to ETDP SETA on 20 February 2026 at 10h00 – 12h00**. Access details will be available on www.etdpseta.org.za as from **12h00** on **13 February 2026**. Kindly note that interested service providers may submit their questions until **23 February 2026**. ***No further questions will be accepted after this date.*** We thank you for your cooperation.

2. PURPOSE & OBJECTIVES

2.1 PURPOSE OF THE PROJECT

ETDP SETA seeks a service provider to assist with organization with **audit readiness and the audit qualification clearance** in relation to the three key financial components below:

- **Commitments**
- **Discretionary Grants**
- **Administration Expenses**

3. PROJECT REQUIREMENTS

A) ACCREDITATION

- **Company must be registered with IRBA or SAIPA**

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B) FUNCTIONAL RESOURCES

2. The service provider must have the required Human Resource Capacity in the following areas:
 - 2.1. Qualified resources to execute the function required by the SETA
 - 2.2. Project Management Skills. No changes will be accepted without the prior written consent of the ETDP SETA.

C) PROOF OF SIMILAR PROJECTS

1. Must provide the SETA with proof of similar projects undertaken in the past five years indicating the success rates per project.

4. COSTING MODEL (PRICE SCHEDULE)

“The service provider must provide an average hourly rate for the firm, as the number of hours will be determined by the contracts remaining to be evaluated.

5. DURATION OF THE PROJECT

It is expected that the ETDP SETA will enter into a service level agreement (SLA) with the successful bidders. The duration of the project will be for **six (6) months** and commence after the signing of the SLA.

6. METHOD OF SUBMISSION

All Documents for Stage 1 (Administrative requirements), Stage 2 (Mandatory Requirements), Stage 3 (Functionality Evaluation), and Stage 4 (Pricing & Specific Goals) must be submitted in electronic format via email to etdpsetarfq@etdpseta.org.za

There must be three folders in the USB covering the following stages:

Folder A: Stage 1: Administrative Requirements

Folder B: Stage 2: Mandatory Requirements

Folder C: Stage 3: Phase A: Functionality Evaluation Requirements
: Phase B: Price and Specific Goal

It is the responsibility of the bidder to ensure that all relevant documents are included in the USB to ensure efficient evaluation of its proposal. ETDP SETA will not take any responsibility for any missing information in the submissions.

7. EVALUATION CRITERIA

The evaluation criteria for the assessment of the proposals will be based on both qualitative and financial aspects of the proposal. Service Providers will be evaluated on functionality. The bidders that score points which equal to or exceed the minimum threshold provided on functionality will further be evaluated on price and specific goals.

The Bid documents will be evaluated individually on a score sheet, by a representative of the evaluation panel according to the evaluation criteria indicated in the Terms of Reference.

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.

7.1. STAGE 1: Administrative Compliance

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

Description	Comply/Submitted
Completion of all SBD Forms: <ul style="list-style-type: none"> • SBD 1 - Invitation to Bid • SBD 4 - Declaration of Interest 	
Completion in full of the General Conditions of Contract (GCC)	
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	

7.2. STAGE 2 – PHASE A_MANDATORY REQUIREMENTS [Folder B (USB)]

Mandatory Requirement	Method of Evaluation
a) Registration with IRBA or SAIPA for the organization	Proof of IRBA or SAIPA
b) Director registration with SAICA or SAIPA	Proof of Active membership with SAICA/SAIPA

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

7.3. STAGE 2 - PHASE B_FUNCTIONALITY EVALUATION

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.

1. The minimum qualifying score for functionality will be **70 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
2. 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 below:

NO	QUALIFYING CRITERIA FOR SHORT LISTING	Method of evaluation	POINTS
1.	<p>Bidder Experience: (25) Relevant reference numbers of work with commitments disclosure note in the SETA space</p> <p>Submit contactable reference letters on the letterhead of the referee and it must be signed by the referee.</p> <p>*[Each reference must clearly indicate.</p> <ul style="list-style-type: none"> • the name of the bidder and the project • objectives of the project (nature of the project) • recommendation and contact details of the referee as well as proof of completed project(s) and must be signed. 	<p>5 reference letters and above 3 reference letters 2 reference letter 0 reference letter</p>	<p>25 15 10 0</p>
2.	<p>Technical proposal for the delivery of Accounting Services; (15 Points)</p> <p>Submit a technical proposal, including a project plan addressing:</p> <ul style="list-style-type: none"> • Accounting Services in terms of the outcomes to be achieved 	<p>Technical proposal including</p> <ul style="list-style-type: none"> • Accounting services outcomes • No accounting services outcome 	<p>15 0</p>
3.	<p>Experience/Profile of key staff (40 points)</p> <p>3.1 Project Management Structure = 10</p> <p>Submit the project management structure indicating roles/titles of each personnel.</p> <p>3.2 Director Team Leader (Relevant Experience; Qualifications; & Skills) in managing similar projects = 15 (Director must be registered with SAIPA or SAICA)</p>	<p>Project management structure</p> <p>No project management structure</p> <ul style="list-style-type: none"> • 5 years and above • Above 3- 5 years • 1 - 3 years 	<p>10 0 15 10 5</p>

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	3.5 (team members must be registered with SAIPA or SAICA) Submit CV of the team members with contactable references		
TOTAL			100

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

7.4. STAGE 3: PHASE B PRICING & SPECIFIC GOALS

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (**Price must be final, include VAT and signed**)
- b. **SBD 6.1** - Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022
 - (**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.

8. 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 **will NOT** be accepted.
5. ETDP SETA reserves the right to include a penalty fee should the training programme not be completed as per the service level agreement.
6. 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.
7. Specific goals shall not be allocated where supporting documents as stated in the bid documents are not provided.
8. Bids submitted are to hold good for a period of **90 days**.
9. No sub-contracting will be allowed for this bid.
10. 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. Companies who form part of this joint venture **MUST** provide an accreditation certificate with relevant authority as stated in Mandatory documents.
11. 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 points for specific goals for B-BBEE status level of contribution are not claimed.
12. 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.
13. 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.
14. Companies that are in the process of de-registration in the CIPC will not be considered.
15. Service Provider must provide proof of Public Liability Insurance prior to the signing of a Service Level Agreement.
16. 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.

9. DISCLAIMER

Protection of Personal Information Act 4 of 2013 (POPIA) and Promotion of Access to Information Act 2 of 2000 (PAIA) Disclaimer

1. By submitting your proposal, you grant the necessary consent as you acknowledge that:
 - ETDP SETA treats data it gathers and personal information it collects, holds and/or processes as private.
2. Therefore:

Your right to privacy and security is very important to us. The ETDP SETA as a responsible party treats personal information of data subjects as private and confidential. To that end, we collect personal information for the purposes set out in this document or otherwise the specific purpose(s) communicated to you.
3. We may also use your information for a number of different purposes, for example to fulfil our legal and regulatory obligations of the SETA.
4. For more detailed information on how and why we may use your information, including the rights in relation to your personal data, and our legal grounds for collection, processing and using it, please view the ETDP SETA Protection of Personal Information Policy and Promotion of Access to Information Manual on our website: www.etdpseta.org.za "ETDP SETA PAIA Manual and POPIA Manual".

10. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation will be available on national treasury e-portal and our website. Documents **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za , Main Menu > Supply Chain Management > Open RFQs as from **12h00** on **13 February 2026**.

All Proposals **must be 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 **02 March 2026**.

No late submission will be accepted!

12. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00** on **02 March 2026**.

13. 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:

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Supply Chain Manager: Email: Tenderers@etdpseta.org.za

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