



**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE REVIEW
OF OCCUPATIONAL QUALIFICATIONS**

WRSCM-2023/2024-0007

1. BACKGROUND TO W&RSETA

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) was established in 2000 in terms of the Skills Development Act (as amended). The public entity aims to facilitate the skills development needs of the Wholesale and Retail (W&R) sector through the implementation of learning programmes, disbursement of grants and monitoring of education and training as outlined in the National Skills Development Strategy (NSDS).

2. OBJECTIVE OF THE TERMS OF REFERENCE

The objective of the terms is to appoint a service provider to project manage the review of The W&R SETA Occupational Qualifications that have been developed as outlined in the scope of services hereto below

3. SCOPE OF SERVICES

The Scope of services will be as follows:

- Review of the occupational qualifications in line with the Occupational Qualification Sub-Framework (OQSF) Policy 2021.
- SAQA Policy

Occupation	Level	Credits	SAQA Code
Dispatching and Receiving Clerk Including: Dispatching Clerk and Receiving Clerk (Part Qualifications)	Level 3	34	99446
Service Station Attendant - Forecourt Attendant	Level 2	28	99708
Store Person	Level 2	41	99703
Visual Merchandiser	Level 3	30	99688
Sales Assistant (Retail Sales Advisor)	Level 3	54	99669
Checkout Operator	Level 2	35	99707
Back Office Process Consultant (Cash Office Clerk)	Level 2	30	101863
Buyer	Level 5	110	103222
Retail Buyer - Occupational Certificate: Supply Chain Practitioner (TETA/SSETA - CIPS)	Level 5	131	103145
Retail Manager General (Retail Chain Store Manager)	Level 5	106	103150
Planner	Level 5	53	103151
Shelf Filler	Level 2	27	118731
Sales Assistant (General) (Perishable Goods Department Coordinator)	Level 3	54	118732
Sales Assistant (General) (Perishable Goods Replenisher)	Level 2	25	118726

Table 1: Occupational Qualifications within the Wholesale and Retail Sector

- The review must include:
 - An occupational qualification having a minimum of 120 credits
 - An occupational qualification must contain between 5% and 10% of soft skills which may include inter alia personal development, workplace preparation before and after a learnership programme, personal finance management, basic entrepreneurship or emotional intelligence depending on the Occupational Qualification.
 - An occupational qualification at NQF level 2, 3 and 4 must contain 20% of foundational learning competence (FLC) components. FLC comprises of mathematical literacy and communication as integral components required for learner to successfully cope with an occupational qualification.
- Scoping Session
 - Provide detailed scoping report with recommendations
 - Collate attendance registers, outline of planned qualification development schedule and nomination forms of working group members.
- Profiling Session
 - Draft profile completed in the curriculum document template in consultation with working group
 - Finalised profile is to be collated in the Curriculum Document Template
 - Collate and submit the Profile report on the prescribed QCTO template
- Develop Curriculum Specifications
 - Develop and collate the curriculum document
 - Collate and submit the Curriculum Specifications Development Report
 - Collate attendance registers for this process and add to documentation
- Develop Assessment Specifications
 - Develop and collate the assessment specification
 - Collate attendance registers for this process and add to documentation
- Develop the Qualification Assessment Specification Addendum
 - Develop and collate the QAS addendum report
 - Collate attendance registers for this process and add to documentation
- Develop Qualification Document and conduct first stage evaluation
 - Conduct evaluation of Qualification document, curriculum document and assessment specifications document. Capture review on the evaluation checklist
 - Circulate draft qualification document and evaluation checklist for comment to working group
 - Gather input from Working Group and finalise qualification document Report
 - Submit Qualification document report to QCTO
- Final Verification
 - Facilitate the final verification meeting with the working group
 - Complete final verification report template
- Packaging of Evidence for submission to QCTO
 - Qualification document
 - Curriculum Document
 - Assessment Specification
 - Confirmation of QAS
 - Evaluation checklist
- Provide on- going technical support for the working groups

- Provide on-going review of the documents as per QCTO recommendations.

NOTE:

The Copyright and Intellectual Property of the occupational qualifications remains the property of the W&RSETA. All updates and versions to the said occupational qualification will remain the property of the W&RSETA. Any usage of the said material should be permitted in writing by the W&RSETA.

4. EXPECTED OUTCOMES AND DELIVERABLES

- Review of occupational qualifications in line with the Occupational Qualification Sub-Framework (OQSF) Policy 2021.
- The duration of the contract will be until 31 March 2025 to cater for remediation on the EISA's and Exemplars after moderation is facilitated.

5. MONITORING PROGRESS OF SERVICE

The W&RSETA will monitor and evaluate the progress of the service delivery as per the deliverables outlined in the contract.

6. QUALITY ASSURANCE REVIEWS OF THE SERVICE

The quality of the services will be managed via monthly reports submitted in the W&RSETA prescribed format to the QQA Coordinator by the Service Provider.

Contracted service providers will be required to sign the W&RSETA Code of Conduct as well as a Confidentiality Agreement (In line with the Protection of Personal Information Act 4 of 2013 (POPIA))

7. INDEPENDENCE AND OBJECTIVITY OF STAFF

In carrying out the services, the Service Provider must ensure that they or any of their staff members remain objective in the execution of their duties.

8. EVALUATION PROCESS

Minimum Requirements: Compliance Evaluation																			
Evaluation Criteria		Submission Requirements:		Weighting															
Compliance Documentation	<table><tr><th colspan="2">Minimum Requirements</th><th>YES</th><th>NO</th></tr><tr><td rowspan="3">SCM submission Requirements</td><td>Bidder must be registered on the Central Supplier Database (CSD) and must submit proof of registration</td><td></td><td></td></tr><tr><td>Bidder must complete and provide one hard copy of the Compliant and Technical Proposal</td><td></td><td></td></tr><tr><td>Bidder must complete the Prescribed Standard Bidding Documentation</td><td></td><td></td></tr></table>			Minimum Requirements		YES	NO	SCM submission Requirements	Bidder must be registered on the Central Supplier Database (CSD) and must submit proof of registration			Bidder must complete and provide one hard copy of the Compliant and Technical Proposal			Bidder must complete the Prescribed Standard Bidding Documentation			0 point	
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	<p>Note: Failure to complete the SBD Documents and adherence to the Mandatory requirements will render your bid as non-responsive This bid is based on a fixed cost per qualification. Please reference point 8 hereto above.</p>																		
Technical Evaluation: Qualification Development Subject Matter Expert																			
Evaluation Criteria				Weighting															
1. Experience and Expertise – Project Management				30 points															
2. Experience and Expertise – Qualification Development				30 points															
3. Capacity to deliver				20 points															
4. Methodology and Approach				20 points															
Total				100 points															

Bidders who pass through the compliance evaluation will then be assessed for Technical Evaluation which is discussed in detail in the following sections. The minimum threshold to qualify a bidder is 70%. If no bidder scores 70% then the bid will be cancelled the bid and re-advertised.

EVALUATION CRITERIA		SUBMISSION REQUIREMENTS		WEIGHTING	FORM OF EVIDENCE										
1. Experience and Expertise – Project Management <table><tr><th>Value</th><th>Weighting</th></tr><tr><td>0</td><td>0 points</td></tr><tr><td>1</td><td>15 points</td></tr><tr><td>2</td><td>21 points</td></tr><tr><td>3</td><td>30 points</td></tr></table>		Value	Weighting	0	0 points	1	15 points	2	21 points	3	30 points	Bidder must demonstrate at least 3 years of company’s experience in project management on the development and/or review of qualifications.		30 Points	1. Company portfolio with list of completed Project Management Programmes 2. CV of the project Manager.
		Value	Weighting												
		0	0 points												
		1	15 points												
		2	21 points												
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		The Project Manager must have at least 5 years of experience in development and/or review of qualifications.													
Point Allocation	Descriptor														
0= (0 points)	No Evidence submitted														
1= (15 points)	<ul style="list-style-type: none">Less than Three (3) years project management company experience in on the development and/or review of qualifications. (5 points)Project Manager with less than 5 years of experience in managing projects related to the development and/or review of qualifications. (10 points)														
2= (21 points)	<ul style="list-style-type: none">Three (3) years project management company experience in on the development and/or review of qualifications. (7 points)Project Manager with 5 years of experience in managing projects related to the development and/or review of qualifications. (14 points)														
3= (30 points)	<ul style="list-style-type: none">More than three (3) years project management company experience in on the development and/or review of qualifications (10 points)Project Manager with more than 5 years of experience in managing projects related to the development and/or review of qualifications. (20 points)														

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4. Project Plan (Methodology and Approach) <table><tr><th>Value</th><th>Weighting</th></tr><tr><td>0</td><td>0 points</td></tr><tr><td>1</td><td>10 points</td></tr><tr><td>2</td><td>14 points</td></tr><tr><td>3</td><td>20 points</td></tr></table>	Value	Weighting	0	0 points	1	10 points	2	14 points	3	20 points	<p>The bidder must provide a comprehensive implementation plan, for the entire project of occupational qualification review. The plan must include the implementation objectives, outline of deliverables, task due dates and timeframes, team member roles and responsibilities and risk assessment. The plan must outline the methodology and approach in addressing the scope of services. The implementation plan must also be in line with the mentioned timeframes of this bid.</p> <table><tr><th>Point Allocation</th><th>Descriptor</th></tr><tr><td>0= (0 points)</td><td>No evidence submitted</td></tr><tr><td>1= (10 points)</td><td>The Plan meets less than 70% of the requirements</td></tr></table>	Point Allocation	Descriptor	0= (0 points)	No evidence submitted	1= (10 points)	The Plan meets less than 70% of the requirements	20 Points	Project Plan				
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EVALUATION CRITERIA	SUBMISSION REQUIREMENTS		WEIGHTING	FORM OF EVIDENCE
		<ul style="list-style-type: none"> Bidder provided a high-level implementation plan, per occupational qualification. The plan briefly outlines the methodology and approach in addressing some of the scope of services. The timelines are not in line with the proposed timeframes <p><i>(Refer the breakdown of the points allocation for the project plan below)</i></p>		
	2= (14 points)	<p>The Plan meets 70% of the requirements</p> <ul style="list-style-type: none"> Bidder provided proof of semi-detailed implementation plan, per occupational qualification, The plan must include some of the following aspects: <ul style="list-style-type: none"> the implementation objectives, outline of deliverables, task due dates and timeframes, team member roles and responsibilities and risk assessment. The plan outlines the methodology and approach in addressing the entire scope of services. The Implementation plan is in line with timeframes of the bid <p><i>(Refer the breakdown of the points allocation for the project plan below)</i></p>		
	3= (20 points)	<p>The Plan meets more than 70% of the requirements</p> <ul style="list-style-type: none"> Bidder provided proof of a comprehensive implementation plan, per occupational qualification, (10 points) The plan must include all of the following aspects: <ul style="list-style-type: none"> the implementation objectives, outline of deliverables, task due dates and timeframes, team member roles and responsibilities and risk assessment. 		

EVALUATION CRITERIA	SUBMISSION REQUIREMENTS	WEIGHTING	FORM OF EVIDENCE
	<ul style="list-style-type: none"> The plan outlines the methodology and approach in addressing the scope of services. The implementation plan is in line with the mentioned timeframes of the bid. <p><i>(Refer the breakdown of the points allocation for the project plan below)</i></p>		

BREAKDOWN OF THE POINTS ALLOCATION FOR THE METHODOLOGY APPROACH:

PROJECT PLAN ASPECTS	TOTAL POINTS
Company profiles inclusive of: (Total points: 5)	5
1.1 Company background and Experience	2
1.2 References / list of completed projects	2
1.3 Proposed Project Organogram, to present the project team.	1
SECTION 2: PROJECT METHODOLOGIES, APPROACHES & PROJECT PLAN.	
Details of project methodologies and approaches : (Total points: 15)	15
2.1 Methodologies & Approaches, in addressing the scope of services	5
1.2 Comprehensive Project Plan reflecting:	10
1.2.1 Project objectives (2 points);	
1.2.2 Project phases (2 points),	
1.2.3 Milestones per phase (2 points)	
1.2.4 Risk Assessment Plan (2 points)	
1.2.5 Projected timeframes per milestone (Gantt Chart) (2 points)	
TOTAL POINTS	20
% CALCULATION	100

9. PREFERENCE POINT SYSTEM

9.1 The following preference point systems are applicable to this invitation to tender:

9.1.1 The 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included).

9.1.2 Points for this tender shall be for:

- Price and
- Specific Goals

9.1.3 A maximum of 80 points is allocated for price on the following basis:

Points for this tender

80/20

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

Where

- Ps = Points scored for the price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)




The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)	Form of evidence
SPECIFIC GOAL 1: HDI	15		CIPC document, Valid BBBEE Certificate / Sworn Affidavit / Certified Copy of ID and Shareholder's certificate.
Enterprise is 100% Black Owned	10		
Enterprise is 51% Black Owned	5		
Enterprise is less than 51% Black Owned	3		
Enterprise is 0% Black Owned	0		
100 % Woman ownership	5		
51% Woman ownership	3		
Less than 51% Woman ownership	1		
0 % Woman ownership	0		
SPECIFIC GOAL 2: PROMOTION OF LOCAL ECONOMY & RDP	5		Valid BBBEE Certificate / Sworn Affidavit, Certified
SMMes (EME)	5		
SMMes (QSE)	3		
Large firm (GEN)	1		

10. PRICING SCHEDULE

- The bid will be awarded on rates. The quantities below are for evaluation purposes only.
- Prices shall remain firm for the duration of the project.

DESCRIPTION	ESTIMATED QUANTITY	RATE (EXCL VAT)	AMOUNT (EXCL VAT)
Rate for Review per qualification	7		
Rate for the development per qualification	7		
TOTAL			R
VAT @ 15%			R
ESTIMATED GRAND TOTAL			R

11. APPROVALS

Reviewed and Recommended By:				
Name	Mr. Mzamo Matyobeni			
Position	BSC Chairperson			
Signature		Date	16/02/2024	
Recommendation:				
Recommended:	<input checked="" type="checkbox"/>	Not Recommended:	<input type="checkbox"/>	<input type="checkbox"/>
Manager's Full Name	Ms. Lindiwe Nhlapo			
Position	Chief Financial Officer			
Notes				
CFO's Signature		Date	22/02/2024	
Approval:				
Approved:	<input checked="" type="checkbox"/>	Not Approved:	<input type="checkbox"/>	<input type="checkbox"/>
Manager's Full Name	Mr. Tom Mkhwanazi			
Position (Executive)	Chief Executive Officer			
Notes				
CEO's Signature		Date	22/02/2024	