



REQUEST FOR PROPOSAL (RFP)

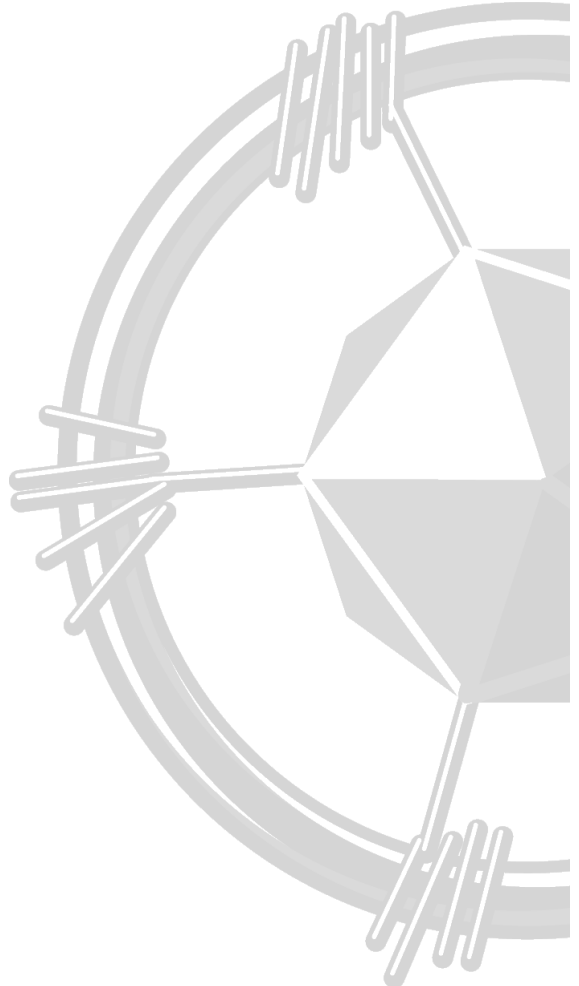
| RFP NUMBER: RFQ/COO/25/26/143 | | | |
|-------------------------------|--|--------------|-------|
| DESCRIPTION | APPOINTMENT OF A SERVICE PROVIDER FOR: CLEARING LEARNER REGISTRATION BACKLOG | | |
| CLOSING DATE | 12 September 2025 | CLOSING TIME | 12H00 |

| SUPPLY CHAIN CONTACTS AND ENQUIRIES | |
|-------------------------------------|---------------------------|
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| Reviewed: Senior Manager: Supply Chain and Contract Management | | Controlled: Chief Executive Officer | |

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1. Introduction to Request for Proposal (RFP)

- 1.1** The Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA) is a Schedule 3A public entity established in terms of the Skills Development Act (Act No. 97 of 1998), Registration Number 17/merSETA/01/04/20, to facilitate skills development for the Metal and Engineering, Motor Retail and Components Manufacturing, Automobile Manufacturing, Plastics Manufacturing and New Tyre Manufacturing sectors.
- 1.2** The merSETA invites proposals from experienced and competent service providers for the registration of merSETA's learner backlog on the merSETA Learner Management System (LMS), in line with merSETA requirements, SETA policies, and applicable legislative frameworks.
- 1.3** This RFP is issued under the Preferential Procurement Policy Framework Act (Act No. 5 of 2000), the 2022 Preferential Procurement Regulations, and the General Conditions of Contract (GCC).

2 Background Information

- 2.1** Due to historical delays, merSETA has a backlog in the registration of learners on the LMS. This backlog affects compliance with funding requirements, accurate record-keeping, and monitoring of training implementation.
- 2.2** The service provider will be required to verify learner data, capture it accurately into the LMS, upload supporting documentation, and resolve rejected records within agreed timelines.
- 2.3.** The estimated number of learner records is sixty thousands (60 000).

3 Objectives of the Service

- 3.1.1** Clear the learner registration backlog
- 3.1.2** Ensure all learner records are accurate, complete, and compliant.
- 3.1.3** Meet merSETA and DHET data management standards..
- 3.1.4** To Provide regular progress and completion reports..

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4 Scope of Work (Service)

4.1 The appointed service provider will be responsible the following outcomes:

4.1.1 Learner Data Verification

- Collect, review, and validate learner documentation.
- Ensure learner records meet compliance standards.

4.1.2 Data Capturing and Registration

- Capture verified learner data onto NSDMS.
- Allocate learners correctly.
- Upload supporting documents.

4.1.3 Quality Assurance

- Conduct pre-submission accuracy checks.
- Resolve rejected registrations within 48 hours.
- Maintain an error log.

4.1.4 Reporting

- Provide weekly progress reports with key metrics.

4.1.5 Confidentiality & Data Protection

- Adhere to POPIA.
- Secure storage and disposal of data post-project.

5 Special Conditions

- The service provider must demonstrate the capacity to capture, verify, and register a minimum of sixty thousand (60 000) learner records within the agreed project timeline.
- The bidder must submit a resource plan showing the number of dedicated data capturers, quality checkers, and supervisors for this project
- The service provider must have proven experience in learner management registration on SETA systems or similar systems within public sector, and compliance with relevant SETA or DHET or similar in public sector data requirements in the past seven (7) years.
- Three (3) signed, contactable reference letters on the client's letterhead confirming similar work done in the last seven (7) years.
- The service provider must comply with POPIA (Protection of Personal Information Act) in all data handling activities.

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- The service provider must have adequate qualified personnel, systems, and infrastructure to capture and register large volumes of learner data within the required timelines.
- Detailed CVs of all team members assigned to the project must be submitted with qualifications in Business/Public Administration or Operations Management within a Learning Environment.

6 Deliverables

- 6.1 Verified learner data sets ready for registration.
- 6.2 All backlog learners registered on LMS with zero pending errors.
- 6.3 Weekly progress reports and a final close-out report.

7 Duration of the Project

- 7.1 The project duration is estimated at three (03) months from appointment date, with agreed milestones at inception.

8 RFP Submission

- 8.1 Bid documents may be emailed to quotations@merseta.org.za on or before the closing date and closing time.
- 8.2 The merSETA will only consider bid documents received on or before the closing date and time.
- 8.3 **Late submissions of the RFP**
Submission of quotation(s) received late (after the closing date and time) will not be considered.

9 Request for Proposal(RFP) Rules

The following rules will apply for this Request for Quotation:

- 9.1 The price(s) quoted shall be valid for a minimum period of sixty (60) days from the closing date and time of this RFP.
- 9.2 The price(s) quoted must be firm and inclusive of value-added tax (VAT) where applicable.
- 9.3 The price(s) must include all related expenses, i.e., transport, accommodation, etc. (where applicable).
- 9.4 A potential supplier or service provider must be validly registered on the Central Supplier Database (CSD), as hosted by the National Treasury.
- 9.5 Only an official purchase order or appointment letter issued by the merSETA will bind the merSETA.

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10 RFP Evaluation Process

The RFP will be evaluated in terms of PPPFA 05 of 2000 and Preferential Procurement Regulation 2022 (80/20). Three (3) stages of evaluation process will be undertaken.

10.1 Evaluation Stage 1: Compliance

10.1.1 All bidders must comply with the administrative requirements outlined in the Standard Bidding Documents and the mandatory requirements listed below. All bidders failing to provide the required information and documentation in this evaluation stage may face disqualification from further evaluation. Failure to comply with the requirements assessed in Stage 1 (compliance) may lead to the disqualification of bids.

| Criteria Description | Supporting Documents |
|--|---|
| A detailed Proposal with a quotation. | Attach detailed Proposal & quotation. |
| Bidders must submit a fully complete Bidder's Disclosure form (failure to declare honestly will lead to bidder being disqualified) | Standard Bidding Document (SBD) 4 and 6.1 |
| In the event that the bidder(s) are entering into joint venture or consortium, the joint venture agreement must be submitted. | Valid JV contract |

10.2 Evaluation Stage 2: Technical Evaluation

The bids will be evaluated for functionality based on the evaluation criteria and the minimum threshold as shown in the table below. **Any bid that fails to meet the overall minimum threshold of 70% and fail to achieve a minimum score for any of the individual criteria below will be disqualified immediately**, and not considered for further evaluation on price and specific goals.

| No | Requirements | Criteria | Total Weighting | Minimum score for individual criteria |
|----|--|---|-----------------|---------------------------------------|
| 1. | Relevant company experience (attach company profile) | Five (5) years or more learner management registration services experience in SETA systems or similar systems within public sector compliance with relevant SETA or DHET or similar in public sector data requirements in the past seven (7) years = 30% | 30 % | 20% |

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| No | Requirements | Criteria | Total Weighting | Minimum score for individual criteria |
|----|--|---|-----------------|---------------------------------------|
| | | <p>Four (4) years learner management registration services experience in SETA systems or similar systems within public sector compliance with relevant SETA or DHET or similar in public sector data requirements in the past seven (7) years. = 20%</p> <p>Less than four (4) years' experience providing learner management registration services = 0</p> | | |
| 2. | <p>Reference letters signed, contactable reference letters on a company letterhead confirming similar work done over the past seven (7) years The reference letters must clearly state the nature of the service/project rendered, the period in which the project was undertaken and must be on the client company letterheads and include verifiable contact details.</p> <p>NB: appointment letters will not be accepted. merSETA reserves the right to contact all the submitted references.</p> | <p>Three (3) relevant, signed, contactable reference letters on a company letterhead confirming similar work done over the past seven (7) years = 30%</p> <p>Two (2) relevant, signed, contactable reference letters on a company letterhead confirming similar work done over the past seven (7) years = 20%</p> <p>Less than two (2) reference letters attached = 0%</p> | 30% | 20% |
| 3 | <p>Methodology and approach</p> | <p>Methodology and approach submitted, demonstrating:</p> <ul style="list-style-type: none"> • Clear understanding of objectives, comprehensive plan, timelines, and Quality Assurance processes • Detailed methodology for fulfilling the specified scope of work | 25% | 25% |

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| No | Requirements | Criteria | Total Weighting | Minimum score for individual criteria |
|--------------------------------|--|---|-----------------|---------------------------------------|
| | | <ul style="list-style-type: none"> Clear and actionable working plan aligned with project goals = 25% | | |
| | | Poor or no methodology, approach and plan = 0% | | |
| 4. | Organisation / Company Capacity | <p><u>CV / Profiles with qualifications attached</u></p> <p>CVs for at least three (3) qualified project team members (including project lead) with ≥3 years' experience each in learner management registrations and SETA compliance or similar compliance within public sector. Attach CV's and proof of qualification in Business/Public Administration or Operations Management within a Learning Environment = 15%</p> <p>CVs for at least two (02) qualified team members with ≥2 years' relevant experience. Attach CV's and proof of qualification in Business/Public Administration or Operations Management within a Learning Environment = 5%</p> <p>CVs not attached and no evidence of competent staff. = 0%</p> | 15% | 5% |
| TOTAL WEIGHTING | | | 100 | |
| MINIMUM WEIGHTING SCORE | | | | 70 |

Each Proposal that meet functional overall minimum threshold evaluation of **70%** will be on equal footing to proceed to the next stage of evaluation of price and specific goals. **NB: Failure to achieve a minimum score for any of the individual criteria above will result in immediate disqualification.**

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10.3 Evaluation Stage 3: Preference Point System

10.3.1 The 80/20 preference point system shall be applicable to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price and 20 points represent the specific goals. The bid documentation's table below will award points to a bidder for achieving the specific goals.

| 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) |
|---|---|---|
| Tenderer who has 51% to 100% black people ownership | 6 | |
| Tenderer who has 30% to 100% black women ownership | 4 | |
| Tenderer who has 30% to 100% black youth ownership | 4 | |
| Tenderer who has 30% to 100% White women ownership | 2 | |
| Tenderer who has 20% or more owners with disability | 4 | |
| Total Points allocated to Specific Goals | 20 | |

Note: Refer to Annexure A for Proof or documentation that may be considered to claim points for specific goal related to persons or categories of persons historically disadvantaged by unfair discrimination.

11 Cost Quotation

11.1 All prices must be VAT inclusive (where applicable) and must be quoted in South African Rand (ZAR). Detailed quotation must be attached.

11.2 The rates of remuneration will be subject to negotiation, not exceeding the applicable rates as contained in the guidelines:

11.2.1 The “Guideline on Fees for Audits done on behalf of the Auditor-General of South Africa (AGSA)¹” as issued by the South African Institute of Chartered Accountants (SAICA);

11.2.2 The “Guide on Hourly Fee Rates for Consultants”, as issued by the Department of Public Service and Administration (DPSA); and/or

11.2.3 Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant.

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12 merSETA's RIGHTS

- 12.1** The merSETA is entitled to amend any bid condition, bid validity period, RFP specification, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the merSETA has records of such bidders, may be advised in writing of such amendments in good time, and any such changes will also be posted on the merSETA's website under the relevant tender information. Therefore, before submitting their bid response, prospective bidders should regularly check the website to stay informed about any amendments related to this matter.
- 12.2** The merSETA reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the merSETA.
- 12.3** The merSETA reserves the right to award this bid as a whole or in part.
- 12.4** The merSETA reserves the right to conduct site visits at bidder's corporate offices and or at client sites if so required.
- 12.5** The merSETA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in National Treasury Instruction 02 of 2016/2017: Cost Containment Measures, where relevant.
- 12.6** The merSETA reserves the right to request all relevant information, agreements, and other documents to verify the information supplied in the bid response. The bidder hereby gives consent to the merSETA to conduct background checks, including FICA verification, on the bidding entity and any of its directors, trustees, shareholders or members.
- 12.7** The merSETA reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers, if applicable (i.e., where a panel is considered).
- 12.8** The merSETA reserves the right to make a final decision on the interpretation of its tender requirements and responses thereto.
- 12.9** The merSETA reserves the right to consider the professional conduct and experiences it had with any bidder that rendered similar services to the merSETA in the past 5 years over and above the references put forward by the bidder in its response.

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13 UNDERTAKINGS BY THE BIDDER

- 13.1** By submitting a bid in response to the RFP, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the merSETA on the terms and conditions and in accordance with the specifications stipulated in this RFP document.
- 13.2** The bidder shall prepare for a possible presentation should merSETA require such, and the bidder will be required to make such a presentation within five (5) days from the date the bidder is notified or such a time determined by merSETA of the presentation. Such a presentation may include a practical demonstration of products or services as called for in this RFP.
- 13.3** The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the merSETA during the bid validity period indicated in this RFP, and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.
- 13.4** The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.
- 13.5** The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with merSETA, as the principal(s) liable for the due fulfilment of such a contract.
- 13.6** The bidder accepts that all costs incurred in the preparation, presentation, and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with the bid will become merSETA property unless otherwise stated by the bidder(s) at the time of submission.

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ANNEXURE A

Specific Goal Guide – Preferential points (80/20)

This specific goal guide will be used to assist providers in submitting relevant documents to confirm specific goals.

“**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 Reconstruction and Development programme as published in government gazette No. 16085 dated 23 November 1994.

Please note that:

- Financial account, management account or auditors’ letter should be submitted confirming turnover of the company determining BBBEE status on Affidavit and B-BBEE CIPC certificate in order for the specific goals can be awarded.

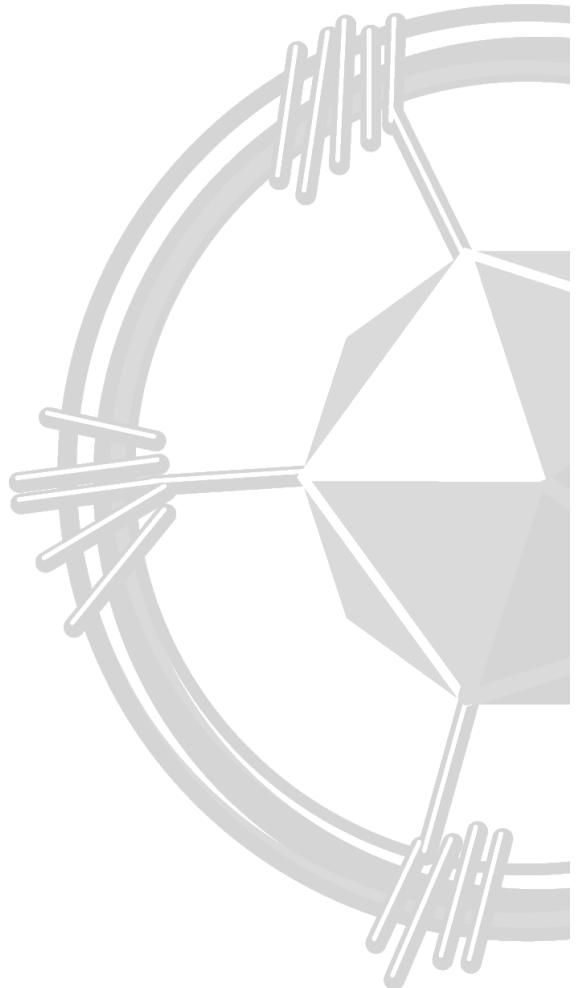
Preferential points for tenders without local content requirements.

?

| Specific goal | 80/20 Preference Point system | Example of Submission | Tick if relevant document submitted | Indicate which document have been submitted |
|---|-------------------------------|---|-------------------------------------|---|
| Black People Ownership – 51% or more | 6 | Valid B-BBEE certificate/Affidavit or B-BBEE CIPC | | |
| Black Women Ownership – 30% or More | 4 | Valid B-BBEE certificate/Affidavit or B-BBEE CIPC | | |
| Black Youth Ownership – 30% or More | 4 | Valid BBBEE certificate/Affidavit or B-BBEE CIPC | | |
| White Women Ownership – 30% or More | 2 | Valid B-BBEE certificate/Affidavit or B-BBEE CIPC | | |
| People with Disability (PWD) Ownership | 4 | Medical certificate | | |
| Total Points allocated to Specific Goals | 20 | | | |

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| AUTHORISATION SIGNATORIES TO CONFIRM RFP | | | |
|--|--|------|--|
| The employee signing below hereby affirms the accuracy of the information requested for the Quotation. | | | |
| Supply Chain Management Representative | | | |
| Full Names | | Date | |
| Signature | | | |
| Technical Representative | | | |
| Full Names | | Date | |
| Signature | | | |



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