



TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO TRAIN SMMEs IN THE NINE (9) PROVINCES ON OCCUPATIONAL HEALTH AND SAFETY, AND NORMS AND STANDARDS FOR SAFE OPERATIONS IN THE TOURISM SECTOR

1. PURPOSE

The main objective of the project is to train 250 Small Medium and Micro Enterprises (SMMEs) on Occupational Health and Safety, and norms and standards for safe operations in the Tourism Sector.

2. BACKGROUND

- 2.1 The Department of Tourism has been implementing the Occupational Health and Safety, Norms and Standard for the Safe Tourism Operations in the Sector since 2021 as part of the Cabinet approved Tourism Sector Recovery Plan (TSRP) which gives effect to the Economic Reconstruction and Recovery Plan (ERRP). The TSRP is a result of a response by the sector and its constituent partners to the multiple challenges brought on by the pandemic and beyond.
- 2.2 The TSRP outlines a set of interventions to ignite the recovery anchored in three strategic themes namely: protecting and rejuvenating supply, re-igniting demand and strengthening enabling capability for long term sustainability. Guided by these themes, one of the seven strategic interventions to be implemented in order to support the revival of the sector is to implement norms and standards for safe operation across the tourism value chain to enable safe travel and rebuild traveller confidence.
- 2.3 To support the TSRP Cabinet approved the set of national norms and standards for the safe operation of the tourism sector in the context of Covid-19 and beyond.
- 2.4 The norms and standards further provide assurance to potential visitors and stakeholders that South Africa's tourism products and services is safe to visit whilst the pandemic persists.

7.A.

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3. OBJECTIVES AND SCOPE OF WORK

3.1 The appointed Service Provider is required to manage the training by facilitating and conducting the training in all nine (9) provinces during the financial year 2026/2027. The scope of work is to train 250 tourism SMMEs in villages, townships and small towns on Maintain Occupational Health and Safety unit standard (8493) and the norms and standards for safe operation of the tourism sector.

3.2 The project will be implemented as follows:

The appointed Service Provider will be expected to carry out the following functions:

- Update and printing of training resources which incorporate unit standard 8493 and the norms and standard,
- Development of a proposal that includes project plan with achievable timeframes for each deliverable and itemized cost;
- Obtain approval in line with standard requirements and administrative procedure for accredited training programmes,
- Upload the learner's information on CATHSSETA Integrated Management System (CIMS),
- Conduct and facilitate the training in all nine (9) provinces for over a period of 2 days;
- Develop reports for each training conducted and the closeout report at the end of the training,
- Conduct virtual Monitoring and Evaluation after the training to ensure compliance,
- Develop and print certificates for all participants who successfully attended the training in line with accredited training procedure.

3.4 It is important to note that the service provider will have to make provisions for all their necessary travel and logistical requirements in their proposal, including travel and accommodation for their implementing team.

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- 3.5 The project will require proactive project management team to ensure that tasks are initiated on time, executed with professionalism and that outputs are of a superior technical quality and delivered within budget.
- 3.6 It is envisioned that Project Management Team (PMT) meetings will be held which include the inception meeting, progress meetings and a closeout meeting. The inception meeting will be utilised to discuss the scope of the assignment in more detail and to finalise the project plan. The inception meeting will include conducting a brainstorming session with the PMT in terms of the implementation deliverables for Phase One and Phase two. The progress meetings will be used to report on progress, and the close-out meeting will be used to present final deliverables and reflect on learnings.
- 3.7 The project management team will consist of representatives from Department of Tourism and the service provider/team. There should be consistent communication between the service provider and the Project Manager at the Department of Tourism. The responsibilities and functions of the service provider will include providing technical input on the project and progress. The experts ought to provide overall quality assurance of the work and to report any changes made regarding personnel, approach and activities to complete assignment.

4. TEAM COMPOSITION AND STRUCTURE

Expertise in Occupational Health and Safety training and Compliance.

Knowledge in the tourism environment.

Expertise in provision of training and facilitation.

Knowledge of project management, communication and report writing.

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Project Manager	Technical Experts
<u>Responsibilities:</u> • Responsible for the overall project management including liaising with the department to report project progress, project monitoring etc. • Provides overall quality assurance and oversight for the project team.	<u>Responsibilities:</u> • Responsible for the execution of technical tasks and outputs described in the Scope of Work above.
<u>Qualifications:</u> • Relevant degree and with a focus on occupational health and safety management or related field; and • Experience in Project Management and Leadership.	<u>Qualifications:</u> • Any relevant degree (NQF 7) in OHS or equivalent; • 5 years' experience in the OHS environment.
<u>Skills and experience:</u> • Minimum 5 years of experience in OHS training. • Relevant 5 years of experience in facilitation of OHS training. • Experience providing strategic leadership and managing training projects. • Experience in OHS training.	<u>Skills and experience:</u> • Minimum 5 years of experience in OHS training. • Relevant 5 years of experience in facilitation of OHS training. • Professional experience in Tourism/OHS training. • Leadership Skills.

4.1 Evaluation Criteria

Proposals will first be evaluated for responsiveness and adherence to the prequalification criteria as stipulated in paragraph 10 below. Bids/ tender proposals that do not comply with pre-qualification bid conditions as stipulated and/or where required documents have not been submitted will result in the bid/ tender proposal being rejected and the bid/ tender proposal being disqualified.

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In the evaluation process, the technical submission will be evaluated first for compliance with all pre-qualification bid conditions after which it will be evaluated and assessed on functionality. A minimum score of **60 points out of 100 points** must be obtained on functionality by the bidder. A prospective service provider will be eliminated if it fails to meet a minimum of **60 points out of 100 points** as the threshold for functionality requirements of the project.

4.2 **First Stage:** Technical

Proposals received from prospective bidders will be evaluated in terms of the following criteria as per the table below. (Evaluation Values: **1** = Poor, **2** = Acceptable, **3** = Good, **4** = Very Good, and **5** = Excellent) NB: Evaluation of proposals can only be done on the basis of information that was requested, and the comprehensiveness of the proposals are critical to the outcome of the bid. Ensure that you submit documents as requested and label them correctly for easy reference and allocation of points/scores.

The appointed Service Provider must demonstrate additional technical skills in terms of:

Technical	Documents to be submitted	Weights
4.2.1 Project approach and methodology of the project to be undertaken Proposed methodology and project implementation plan: • Proposal not likely to address the needs of the assignment = 1 • Proposal likely to address the needs of the assignment= 2 • Proposal provides an overview of the training requirements and addresses areas of the requirements = 3 • Proposal provides an overview of the training requirements, including covid-19 protocols = 4 • Comprehensive proposal addresses all requirements, includes covid-19 tourism	Comprehensive Project implementation plan that includes how safe operation for tourism protocols, OHS compliance, tools that will be incorporated into the training programme (this should include examples of tools	30

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protocols, OHS compliance and use of tools as part of the training of beneficiaries = 5	that can be used in the workplace).	
4.2.2 Company proof of record that it is eligible to train on Maintain Occupational Health and Safety Unit standard (8493) The following scoring matrix will be used to evaluate these criteria: • No proof of reference letter from CATHSSETA attached = 0 • Proof of reference letter from CATHSSETA attached =5	Company proof of record or reference letters from CATHSSETA that is eligible to train on Maintain Occupational Health and Safety Unit standard (8493)	40
4.2.3 Qualification, skills and experience of project team Project Manager / Leader should possess relevant degree in OHS or equivalent, at least a minimum of 5 years' experience in coordinating training OHS related projects. Team composition The following scoring matrix will be used to evaluate these criteria • No team members with relevant qualifications and 3 years' experience = 1 • 1 team member with relevant qualifications and 3 years' experience = 2 • 2 team members with relevant qualifications and more than 3 years' experience = 3 • 3 team members with relevant qualifications and more than 3 years' experience = 4 • 4 team members or more with relevant qualifications and more than 3 years' experience = 5	Organogram, CVs' and copies of qualifications in the field of related OHS/ Project Management for the Project manager/leader and the supporting team	20
4.2.4 Locality (The training provider must have an office for operational purposes)	Attach proof of valid lease	10

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• No proof of Office attached = 0 • Proof attached =5	agreement or a municipality statement that is not older than 3 months.	
Total Weight		100

4.3 Second Stage: Quotations and Price

All quotations must be itemised as per scope of work stipulated in paragraph 3.2. failure to do that your proposal will be disqualified. Only the financial proposals of the qualifying bids as per paragraph 4.1 above will be evaluated in terms of the 80 / 20 preferential points system, where the 80 points will be used in terms of the price only and the 20 points will be used in terms of the specific goals as categorized as follows Women - 06 points, Black Ownership – 12 points and SMMEs – 02 points. It is important to note that only the financial proposals of bids that obtained minimum of 60 points out of 100 points for functionality will be evaluated for price. Points for B-BBEE will be allocated based on information submitted by the potential bidders in relation to the B-BBEE status level of contributor.

5. REPORTING

The appointed Service Provider will report to the Director: Tourism Sector Human Resource Development and Governance. The report will include monthly activities and close-out or annual report and expenditure report. The Service Provide shall compile the report that will be approved by the Director before it could be sent to the Deputy Director-General (DDG). The report shall outline amongst other matters, the status on the implementation and training of the OHS norms and standards for the safe operation of the sector. The Service Provider may also outline areas of needed intervention by the DDG or higher authorities.

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6. PERFORMANCE EVIDENCE

- 6.1 The appointed Service Provider must submit attendance registers, souvenirs in a form of pictures, programme training activities, proof of training sessions and any other form of evidence that may be required per province. The submitted documents will form part of the departmental evidence for reporting end of the quarter and final annual report.

7. OUTCOMES AND QUALITY INDICATORS

The Service Provider must make sure that the training to be provided is of high-quality standards and strategic quality in line with the Maintain Occupational Health and Safety, Unit Standard (8493) norms and standards for the safe operation of the tourism sector.

8. DISBURSEMENT

The Service Provider will make provisions in the proposal for all necessary travel and logistic requirements for their implementing team. The Department of Tourism will make provision and will source venue and catering for the participants.

9. CONTRACT

The project is intended to be implemented in the 2026/2027 financial year, with specific dates to be announced during project inception meeting. The key elements outlined under the scope of work (preparation, information gathering and reporting), shall be delivered within this timeframe.

10. PRE-QUALIFICATION CRITERIA

- Only South African registered companies are allowed to bid for this project.
- The service provider has not failed to perform on any previous contract(s) and has been issued a written notice to this effect.
- A valid letter of training accreditation on Maintain Occupational Health and Safety Unit Standard (8493) or programme approval from CATHSSETA.

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- A project plan with proposed activities and itemized cost quotation.
- If the service provider has previously managed the implementation of an OHS training project, performance of those bidders will be considered when evaluating the proposals.

NB: Any service provider that fails to meet the pre-qualification bid conditions as stipulated above will be considered unacceptable proposal and will be disqualified.