



Quality Council for Trades & Occupations

www.qcto.org.za

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INVITATION TO TENDER

APPOINTMENT OF AN EXPERIENCED AND QUALIFIED SERVICE PROVIDER FOR THE QQSF ARTICULATION PROJECT

TENDER NO: QCTO 10/2023

CLOSING DATE: 31 JULY 2023 at 11:00

Company Name		
Address		
Contact person		
Contact numbers	(w)	(cell)
Email address		

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1. INTRODUCTION

The QCTO is a Schedule 3A Public Entity that was established in accordance with the Skills Development Act, No. 97 of 1998 (as amended) and the National Qualifications Framework Act, No. 67 of 2008 (as amended) and came into operation on 1 April 2010. The main functions of the QCTO amongst others are to develop standards for occupational qualifications including trades and skills programs, accredit skills development providers, and assessment centres, conduct assessments, quality assurance and issue certificates to qualifying candidates. Therefore, the QCTO is responsible for standards generation and maintenance; quality assurance of occupational full and part qualifications registered on the National Qualifications Framework (NQF) and the Occupational Qualifications Sub-Framework (OQSF) policy, including skills programs. The QCTO has approximately 120 staff members and is situated in Hatfield, Pretoria. More information can be obtained from <https://www.qcto.org.za/>.

The Quality Council for Trades and Occupations (QCTO) seeks to appoint an experienced and qualified service provider for the articulation project and in accordance with the General Conditions of offer, as well as the specifications. Bidders are requested to complete this tender document, together with all the standard bidding documents in full and submit proposals in sealed envelopes marked **Tender Number: QCTO 10/2023** and placed in the tender box at 256 Glyn Street Hatfield, Pretoria, 0083, not later than the closing time and date. **It is compulsory for bidders to attend the briefing session.**

Table: 1.1

Closing Date	Address
Date: 31 July 2023 Time: 11:00	Quality Council for Trade and Occupations Tender Box @ Reception 256 Glyn Street Hatfield Pretoria 0083

NB: Late Submissions will not be considered.

Table: 1.2

Briefing Session Information
Compulsory Virtual Briefing session Date: 14 July 2023 Time: 11:00am – 12:00am Link: To receive the link, kindly email tenders@qcto.org.za before 11 July 2023. The link will be sent by the end of business on 12 July 2023.

Before submission, the bidders must check that all pages are correctly numbered and that all required documents are signed and initialled. QCTO will hold the duly authorised signatory liable on behalf of the bidder.

NB: Please create an index page for ease of reference. Paginate your proposal submission by using numbered file dividers or a similar system.

Each page should be initialled with black ink.

1.1 PARTNERSHIPS AND LEGAL ENTITIES

In the case of the bidder being a partnership, close corporation or a company, a certificate reflecting the names, identity numbers and address of the partners, members or directors (as the case may be) must be submitted with the tender.

1.2 CONSORTIUMS AND JOINT VENTURES

1.2.1 If the tendering unit emanates from a joint venture or collaborative partnership or consortium (including a newly formed company), which does not have a joint track record of at least three (3) years, the individual entities that make up the tendering unit should each provide all the mandatory requirements. Should all the requirements in respect of the tendering unit or the individual entities, as the case may be, not be met, the tendering unit will be disqualified.

1.2.2 It is recognised that bidders may wish to form consortia to provide the services.

1.2.3 In response to this invitation to tender, a consortium shall comply with the following requirements: -

1.2.3.1 A copy of the agreement entered into by the consortium members shall be submitted with the tender. It shall be signed so as to be legally binding on all consortium members.

1.2.3.2 The tender document shall be signed so as to be legally binding on all consortium members;

1.2.3.3 One of the members shall be nominated by the others as authorised to be the lead member and this authorisation shall be included in the agreement entered into between the consortium members;

1.2.3.4 The lead member shall be the only authorised party to make legal statements, communicate with QCTO and receive instructions for and on behalf of any or all the members of the consortium;

1.3 ACCEPTANCE OF TENDERS

The QCTO does not bind itself to accept either the lowest or any other quote and reserves the right to accept the bid which it deems to be in the best interests of the organisation. QCTO reserves the right to accept the offer in full or in part or not at all.

2. AIM OF PROPOSAL

The purpose of this bid is to appoint an experienced and qualified service provider for the articulation project. This document intends to provide the prospective service providers with adequate information to understand and respond to QCTO's requirements. It serves to ensure uniformity in responses and to provide a structured framework for the evaluation of proposals. The appointment will be for a period of six (06) months commencing on the date as prescribed in the Letter of Award and signed Service Level Agreement to be signed by both parties.

3. THE PROJECT OUTLINE

- 3.1** An analysis of a majority of qualifications on the NQF and its related Sub-Frameworks to provide a preliminary map of where OQSF qualifications articulate to qualifications on other sub-frameworks with a particular emphasis on articulation between the OQSF and HEQSF, and where qualifications on other sub-frameworks articulate to the OQSF
- 3.2** Providing the results of this analysis in an appropriate format as agreed with the QCTO to the organisation for use in the Second Phase of this project
- 3.3** Providing models of how the articulation pathways could work based on the analysis of the data gathered.
- 3.4** The service provider will report to the Director: Research & Analysis, and will consult with the D: R&A regarding the analysis and format of the final dataset to be gathered and submitted as well as an analytical report.

4. SCOPE OF SERVICES

- 4.1** This phase of the project is intended to be a data gathering phase, with the concluding analysis being conducted in the forthcoming (2024/25) financial year.
- 4.2** The QCTO is the custodian of the OQSF, and the qualifications thereon, and the OQSF is one of the three Sub-Frameworks of qualifications of the NQF. The NQF is envisioned as a "single integrated framework of qualifications" – and thus each Sub-Framework of qualifications must link or 'articulate' with qualifications on the other Sub-Frameworks to ensure pathways for lifelong learning are available to South African learners.

The GENFETQSF deals with Basic education– and this means that it is generally qualifications of first entry for learners. In the main, the OQSF anticipates that learners will exit the GENFETQSF with a basic education qualification and that qualifications on the OQSF will provide pathways for such learners to specialise in an occupational field and will continue on with further study or will use their OQSF qualification to enter into the world of work.

4.3 In the case of the HEQSF, it is most likely that OQSF learners will move from the OQSF and use their Occupational Qualification as an entry point into Higher Education. It is also possible for learners to move from the HEQSF into the OQSF, and articulation pathways need to exist to allow for smooth and accessible movement between related qualifications on both Sub-Frameworks.

4.4 Given the large number of qualifications across the three sub-frameworks of the NQF, there are many potential articulation pathways that need investigation, and thus this phase of the research is primarily intended to be a data gathering phase, with a brief analytical report component describing models for articulation accompanying the dataset.

4.5 The final analysis of the data gathered will be a separate project.

5. TECHNICAL SPECIFICATIONS

5.1 The service provider must ensure that the lead staff member assigned to this project is in possession of least a Master's Degree in Education/Social Sciences or a related discipline, with a demonstrated track record of working in and publishing in the field of Occupational/Vocational training.

5.2 The service provider must also be able to demonstrate a large and sophisticated data gathering workflow with sufficient staff to work through and compare a large number of qualifications across the various sub-frameworks of the NQF

6. DELIVERABLES

The following deliverables are anticipated:

6.1 Delivery of the final dataset will take place on or before 28 February 2024.

6.2 Delivery of the analytical report describing appropriate models of articulation will take place on or before 28 February 2024

7. PRICING

- 7.1.1 The bidder must submit details regarding the tender price for the services on the pricing schedule provided in SBD 3.3. The completed form/s must be submitted together with the price proposal.
- 7.1.2 Bidders are required to indicate their rates (costs) inclusive of all applicable taxes.
- 7.1.3 Bidder's proposed cost for the project should be an all-inclusive maximum fixed price fee.
- 7.1.4 All other cost increases will be negotiated, not exceeding the actual inflation rate (CPI).
- 7.1.5 QCTO will not provide upfront payments.

NB: FAILURE TO PROVIDE THE PRICING PROPOSAL WILL INVALIDATE THE BID AND RESULT IN IMMEDIATE DISQUALIFICATION OF THE PROPOSAL

One (1) original pricing proposal must be submitted in **a separate sealed envelope**: 'The pricing schedule must be submitted adjacent to the SBD3.3 form in the bid proposal'.

8. SUBCONTRACTING

No part of the required services can be subcontracted; the full required service of this bid must be performed by the contracted service provider participating in the bidding process.

9. SERVICE LEVEL AGREEMENT

The successful bidders will be expected to enter into a service-level agreement with the QCTO. The service level agreement will include, amongst others, the following:

- i. Period of agreement;
- ii. Changes to the proposed team;
- iii. Method of communication and reporting;
- iv. Non-performance;
- v. Financial penalties and termination of the contract;
- vi. Procedures relating to payments;
- vii. Procedures relating to management reports;
- viii. Terms of deliverables;
- ix. Reviews;
- x. Confidentiality; and
- xi. Disputes.

10. EVALUATION CRITERIA

QCTO may request additional information, clarification, or verification regarding any information contained in or omitted from a bidder's proposal. This information will be requested in writing, and the bidder must provide the requested information within forty-eight (48) hours after the request has been made; otherwise, the bidder may be disqualified.

QCTO may conduct due diligence on any bidder, which may include interviewing customer references or other activities to verify a bidder's or related information and capabilities and, in these instances, the bidders will be obliged to provide QCTO with all necessary assistance and/or information which QCTO may reasonably request and to respond within the given time frame set by QCTO.

The 80/20 principle will be applied in terms of the Preferential Procurement Policy Framework Act.

The tender will be evaluated in three stages:

- Stage 1: Mandatory
- Stage 2(a): Functionality A: Industry Experience, expertise and capacity
- Stage 2(b): Functionality B – Presentation / Demonstration
- Stage 3: Price and Specific goals

Stage 1: Mandatory Evaluation

During this stage, proposals will be reviewed to determine compliance with all mandatory requirements, and such documents must be signed by a duly authorised representative.

I/We have attached to this document:	Tick if submitted		Office use
	Yes	No	
• Four hard copies of the technical bid document including the duly completed terms of references document (initialled by authorised signatories)			
• Submission of the tender pricing together with the completed SBD 3.3 (Separately sealed in an envelope labelled PRICING).			
• One (1) USB Submission of the technical bid document including the duly completed terms of references document (initialled by authorised signatories)			
• Proof of company/closed corporation registration and a copy of CM/CK certificates			
• Copies of the identity documents of those with equity/shares			
• Duly Completed Standard Bidding Documents (SBD 1, SBD 4, SBD 6,1)			
• CSD Registration (National Treasury)			
• Letter of Good standing (COIDA) issued by Department of Labour			

Note: Failure to meet or submit any or all the above mandatory requirements will lead to bidder being disqualified.

Stage 2 (a): Functionality (First Phase)

No.	Evaluation Criteria	Guideline	Scoring	Points
1	References	Bidder's relevant experience for the assignment: NB: Reference letters must not be older than five (05) years NB: Letters of agreement, contracts, or purchase orders may not replace relevant reference letters. Official reference letters must bear the letterheads of the organization/s where similar service was successfully rendered with the following: - Duly signed and dated - Name of the bidder mentioned - Overview of the project - Recommendations	- A bidder with fewer than two (02) relevant letters = 0 points - A bidder with two (02) relevant letters = 5 points - A bidder with three (03) relevant reference letters = 10 points - A bidder with four (04) relevant reference letters = 15 points - A bidder with five (05) or more relevant reference letters = 20 points	20
2	Project lead (Research Manager)	The bidder must demonstrate by attaching the full CV of one project lead with at least a Master's Degree in Education and Training/Social Sciences or a related discipline, with a demonstrated track record of working with and publishing in the field of Occupational/Vocational training. The bidder must attach	- Qualified Project Lead with three (03)-years track record of working and publishing in the field of Occupational/Vocational training = 5 points - Qualified Lead Researcher with four (04) years track record of	20

No.	Evaluation Criteria	Guideline	Scoring	Points
		- A CV detailing a demonstrated track record of working with and publishing in the field of Occupational/Vocational training - Qualifications- a Master's degree in Education and Training/Social Sciences or a relevant NQF level 9 Qualification or equivalent.	working and publishing in the field of Occupational/Vocational training = 10 points - Qualified Lead Researcher with five (05)-years track record of working and publishing in the field of Occupational/Vocational training = 15 points - Qualified Lead Researcher with six (06) years track record of working and publishing in the field of Occupational/Vocational training = 20 points	
3	CVs of the team	The bidder must demonstrate by attaching the full CVs of the team that has the experience, knowledge, skills, and ability to provide QCTO with the required service. The team should all at minimum be in possession of an NQF level 7 or equivalent qualification in Education and Training/Social Sciences or a related discipline. The bidder must attach	- Qualified and experienced team of fewer than 4 = 0 points - Qualified and experienced team of 4 = 10 points - Qualified and experienced team of 5 = 15 points	20

No.	Evaluation Criteria	Guideline	Scoring	Points
		- The CVs of the team which details experience - A minimum of two years of experience in large-scale data gathering and analysis is required for all team members - Relevant Qualifications/ Certificates	Qualified and experienced team of 6 =20 points	
4	Portfolio of evidence	The bidder must demonstrate competence by attaching relevant reports of work done by the bidder NB: Samples of work done in the education and training or large-scale data analysis disciplines. Samples must not be older than five (05) years. If the work done was confidential in nature, then overviews of the project/s will suffice.	- A bidder with fewer than two (02) relevant project examples = 0 points - A bidder with two (02) relevant project examples = 5 points - A bidder with three (03) relevant project examples = 10 points - A bidder with four (04) relevant project examples = 15 points - A bidder with five (05) or more relevant reference letters = 20 points	20
5	Detailed methodology	A detailed methodology which demonstrates the service providers ability to handle large and sophisticated data gathering workflows with sufficient staff to work through and compare a large number of qualifications across the various sub-frameworks of the NQF	Provided methodology but does not demonstrate understanding of the scope of work and does	20

No.	Evaluation Criteria	Guideline	Scoring	Points
			not cover the full aspects as described = 10 - Detailed methodology that demonstrates understanding of the scope of work and covers the full aspects as described in scope of work and expected milestones = 15 - Detailed methodology demonstrating understanding of the scope of work, expected milestones and a highly detailed management plan that includes control measures to prevent deviation from expected deliverables = 20	
				100

Each criterion will be assessed and scored on the evaluation sheet using the above points.

Threshold: Bidders who score less than 70 out of 100 points on functionality will not be considered for presentation/demonstration and will be disqualified for this project.

Stage 2 b): Functionality – Presentation / Demonstration (Second Phase).

The second phase of the functional evaluation stage is based on presentation/demonstration, which will be evaluated using the following criteria and points:

NB: Presentations/demonstrations may be done via Microsoft Teams or in person at the QCTO offices at the request of the bidder

STAGE 2: FUNCTIONALITY: (PRESENTATION/ DEMONSTRATION): PHASE 2		
Presentation/ Demonstration	Bidder's understanding of the requirements and its capacity to deliver = Maximum 30 points	30
	Bidders demonstration of previous work done and strategy = Maximum 50 points	50
	Detailed examples of previous comparable projects = Maximum of 20 points	20
Total		100

Each of the criteria is to be assessed and scored on the evaluation sheet using the above points.

Threshold: Bidders who score less than 70 out of 100 points on presentation / demonstration will not be considered for Price and Specific goals and will be disqualified for this project.

Stage 3: Price and Specific Goals

Only bids that achieved the minimum qualifying score/percentage for functionality will be considered further in terms of the **80/20 preference point system**.

The formulae to be utilised in calculating points scored for the preference point system will be included in the tender document.

Step 1 will be the calculation of points for price where the lowest bid will score 80 points for price, while bids with higher prices will score lower points for price on a pro-rata basis.

The following formula will be utilised to calculate the points for price in respect of tenders with a Rand value below R50 000 000 (all applicable taxes included):

$$P_s = 80 \left[1 - \left(\frac{P_t - P_{min}}{P_{min}} \right) \right]$$

Where:

P_s = Points scored for comparative price of proposal or offer under consideration;

P_t = Comparative price of proposal or offer under consideration; and

P_{min} = Comparative price of lowest acceptable proposal or offer.

Step 2 will be the calculation of points for the Specific goals contribution where 20 points will be awarded to a Bidder as per table below:

Specific goals	Definitions	Number of Points
Women	5 points can be claimed by bidders who have owners/directors who are Black women regardless of percentage of ownership	5
Youth	5 points can be claimed by bidders who have owners/directors who are Black persons from	5

	the age of 16 to 35 regardless of percentage of ownership	
Historically Disadvantaged Individuals (HDI)	10 points can be claimed by bidders who have owners/directors that are Historically Disadvantaged Individuals, females or disabled South African person regardless of percentage of ownership	10

Note: Non-compliant contributors or failure to provide certification or affidavit substantiating the attainment of any of the Specific goals criteria will result in the Bidder being awarded zero (0) points for the Specific goal. In the case of B-BBEE certificates, the bidder must also submit the full verification report, which shows the percentage of Women ,Youth and HDI ownership.

11. CALCULATING THE FINAL SCORE

The points scored for the price (step 1) will be added to the points scored for the Specific goals (step 2) to obtain the bidder's total points scored out of 100.

AREAS OF EVALUATION	POINTS
Price	80
Specific Goals	20
Total	100

12. TENDER VALIDITY PERIOD

The validity period for this tender is 180 days.

13. ENQUIRIES

Any technical enquiries regarding the terms of reference shall be directed in writing to the following:

1. Mr. Marco MacFarlane
E-Mail: Macfarlane.M@qcto.org.za

Any SCM enquiries regarding the terms of reference shall be directed in writing to:

Mr Lekhotla Motloun
Telephone Numbers: 012 003 1847
E-mail address: tenders@qcto.org.za

Kindly indicate tender reference number and full description on the subject line for all enquiries

Compulsory CV template for Uniformity

Bidders must clearly indicate the Role in the CV template.

Bidders must replicate this CV template for each member of the Team.

Proposed role	
First name and Surname	
Date of birth	
Nationality	
Professional Membership	
Present position	
Years with the bidder's organization or Company	

Education

Institution	Duration (Date from - Date to)	Qualification Obtained (e.g., Degree(s) or Diploma(s) (Start from the most recent, Copies of each qualification to be included in the CV pack)

Professional Experience (Relevant to the Area or Role)

Date (From – To)	
Organisation	
Location	
Position	
Description of duties (listed)	

Date (From – To)	
Organisation	
Location	
Position	
Description of duties (listed)	

Date (From – To)	
Organisation	
Location	
Position	
Description of duties (listed)	

References (relevant to the role)

Name	Organisation	Contact details

Compulsory form for References.

Bidders must substantiate each reference with a letter from the organisation where the services were rendered.

Name of company	Service rendered	Start date	End date	Value of the contract