

## TERMS OF REFERENCE - REQUEST FOR QUOTATIONS

### THE APPOINTMENT OF A FACILITATOR FOR FOODBEV SETA STRATEGIC PLANNING SESSION FOR FB SETA.

The Food & Beverages Manufacturing Sector Education and Training Authority's (FoodBev SETA) hereby invites you to submit quotations to provide strategic facilitation services as follows:

<b>Closing date of submission</b>	22 August 2022
<b>Closing time of submission</b>	11:00 a.m.
<b>Quotes to be e-mailed to</b>	<a href="mailto:scm@foodbev.co.za">scm@foodbev.co.za</a>
<b>All quotes must be valid for at least</b>	30 days
<b>Delivery address for the services</b>	External venue to be confirmed

All queries/ clarifications can be sent in writing, citing the bid reference above to the under-mentioned person before the closing date for the quote:

<b>Queries address to</b>	Katleho Mashego
<b>Telephone Number: Landline</b>	011 253 7300
<b>e-mail address to send queries</b>	<a href="mailto:LungaM@FoodBev.co.za">LungaM@FoodBev.co.za</a>

## 1. BACKGROUND

- 1.1. Food and Beverages Manufacturing SETA ("FoodBev SETA") is a Schedule 3A Public Entity established in terms of the Skills Development Act 97 of 1998. FoodBev SETA is currently operating in Johannesburg at number 7 Wessel Street, Rivonia Sandton. FoodBev SETA's function is to promote, facilitate and incentivise skills development in the food and beverages manufacturing sector. FoodBev SETA is one of the 21 Sector Education and Training Authorities (SETAs) across the economy mandated to deliver on the National Skills Development Plan (NSDP) outcomes.
- 1.2. The FoodBev is in the process of reviewing the organisation's Strategic Plan and developing the Annual Performance Plan for the next financial year (2023/24). Thus, the need for a strategic planning session and capacity building scheduled to take place from the 31<sup>st</sup> of August to 02<sup>nd</sup> September 2022 all FoodBev SETA employees.

## 2. PURPOSE

- 2.1. The FoodBev SETA seeks to appoint a competent and experienced service provider to facilitate a strategic planning session on 31<sup>st</sup> of August 02<sup>nd</sup> September 2022 for all Foodbev SETA employees. The session outcome must inform the final Strategic Plan and Annual Performance Plan for the FoodBev SETA. The strategic session will include capacity building which will be conducted physically at a venue to be confirmed.

## 3. SCOPE OF WORK AND DELIVERABLES

**The successful service provider will be expected to:**

- 3.1. Review existing strategic documents.
- 3.2. Conduct interview with the Chief Executive Officer to plan the workshop programme.
- 3.3. Compile a workshop programme in consultation with the Executives and Senior Management.
- 3.4. Facilitate a strategic planning session over two (2) days for all FoodBev SETA employees.
- 3.5. Compile a comprehensive strategic planning report for the Board which will entail clear programme of action from management that will be included in the Annual Performance Plan.
- 3.6. Facilitate a strategic session that will entail an in-year monitoring of the strategic plan for 2020-2025 and facilitate any new board strategic requirements.
- 3.7. Compile a final report for the strategic planning.
- 3.8. Consolidation of strategic documents (Annual Performance Plan and Strategic Plan). Ensure the Strategic documents are SMART and aligned to the Framework for Strategic Plans and Annual Performance Plan from the Department of Planning Monitoring and Development (DPME).
- 3.9. Provide a motivational talk and oversee role plays.

## 4. THE RFQ EVALUATION PROCESS

**The following criteria will be adhered to:**

- 4.1. **Criteria 1: Compliance Evaluation** – bidders will first be evaluated in terms of compliance that is meeting minimum requirements. Bidders who do not submit required documents will be disqualified and not move onto the next stage of evaluations.
- 4.2. **Criteria 2: Functional Criteria** – Functionality points are equal to 100 points. Bidders are required to achieve a minimum score of 70 points on functionality evaluations to qualify to be evaluated on BBBEE & Price. All bidders who do not score the minimum points will be disqualified.
- 4.3. **Criteria 3: Price and B-BBEE** status level of contributor and this will be evaluated on an 80/20 preferential procurement principle.



## 5. CRITERIA 1 - COMPLIANCE EVALUATION

### The Bidders must submit:

- 5.1. Must be registered on the National Treasury CSD (Central Supplier database): A full report must be submitted.
  - 5.2. Completed and signed Standard Bidding Documents (SBD) forms attached to the bid.
  - 5.3. Tax clearance certificate and Pin.
- Failure to submit the above documents will result in the bidder being disqualified.

## 6. CRITERIA 2 - FUNCTIONALITY EVALUATION

FUNCTIONALITY EVALUATION CRITERIA			
Capacity and experience of the facilitator			Weighting
The proposed facilitator must have the capacity and proven experience of successfully conducting strategic sessions, capacity building (includes role play) and motivational talks in the public sector. The proposed facilitator must have a minimum of five (5) year experience in the implementation of strategic sessions in the public sector <b>and</b> must possess at a minimum NQF level seven (7) qualification in strategy development and implementation /or equivalent.			20,00
<b>Please Note:</b> Points will only be allocated if the proposed facilitator is in possession of the required minimum years of experience <b>and</b> the necessary qualifications.			
Score Allocation			
i)	Less than five (5) years’ experience and relevant qualifications	0,00	
ii)	Five (5) years’ experience and relevant qualifications	10,00	
iii)	More than five (5) Years’ Experience and relevant Qualifications	20,00	
Required supporting documents			
<b>Qualifications</b> Certified copy(ies) of the required NQF level 7 relevant qualification(s). Note that foreign qualifications must be evaluated and approved by SAQA for the bidder to be eligible for points.			
<b>Experience</b> A detailed CV of the proposed facilitator clearly showing relevant experience must also be submitted.			
Company experience (reference letters)			Weighting
The bidder must submit reference letters or testimonials of previous completed work of similar nature in the public service.			30,00
Score Allocation			
i)	No (0) reference letters / testimonials submitted	0,00	
ii)	One (1) reference letters / testimonials submitted	10,00	
iii)	Two (2) reference letters / testimonials submitted	20,00	
iv)	Three (3) reference letters / testimonials submitted	30,00	
Required supporting documents			
The bidder must submit reference letters or testimonials for similar work completed. The reference letter or testimonial must have the following details: <ul style="list-style-type: none"><li>▪ The reference letter/ testimonial must be in the entity’s letterheads</li><li>▪ The description of the services provided,</li><li>▪ The contact’s name and details on the referee,</li><li>▪ Performance rating/levels of the service provided</li></ul>			



Note that it is the responsibility of the bidder to ensure that the reference letters/ testimonials submitted contains this information as reference checks may be conducted on the above criteria.			
<b>Methodology</b>			<b>Weighting</b>
Project proposal and approach that demonstrates a comprehensive and relevant approach to the requirements of the specifications. The proposal must contain detailed breakdown of activities that will lead to achievement of the expected outputs of the project outlines in section 3 of this RFQ.			<b>30,00</b>
<b>Score Allocation</b>			
<b>Excellent</b>	All elements are explained in detail (in a practical way and not just an academic, copy and paste from the specification)	<b>30,00</b>	
<b>Very Good</b>	all elements are explained but not in detail	<b>25,00</b>	
<b>Good</b>	At least 80% of the elements are explained in detail	<b>20,00</b>	
<b>Average</b>	At least 50% of the elements are explained in detail	<b>10,00</b>	
<b>Below Average</b>	Ambiguous methodology and all elements indicated are unrelated or of a low quality	<b>5,00</b>	
<b>Poor</b>	elements not discussed	<b>0,00</b>	
<b>Required supporting documents</b>			
The bidder is expected to submit a detailed proposal that comprises a detailed approach, methodology and process aligned to timeframes to be adopted in preparation for the strategic planning session, during the session and after the session in finalising the report. Project plan must be linked to the deliverables and outputs.			
<b>Company experience</b>			<b>Weighting</b>
The bidder must demonstrate experience and understanding of the Department of Planning Monitoring and Evaluation (DPME) Framework and guidelines for planning, including evidence of assisting a public entity with developing their strategic planning documents (Strategic plan).			<b>20,00</b>
<b>Score Allocation</b>			
<b>i)</b>	No evidence provided	<b>0,00</b>	
<b>ii)</b>	One (1) reference letter provided/signed off work	<b>10,00</b>	
<b>iii)</b>	Two (2) reference letters provided/signed off work	<b>15,00</b>	
<b>iv)</b>	Three (3) reference letters provided/signed off work	<b>20,00</b>	
<b>Required supporting documents</b>			
The bidder must provide evidence in the form of reference letters or signed off work indicating that they have work experience in the public sector in relation to the DPME framework and guidelines (client where work is done or presentation to client).			
<b>TOTAL</b>			<b>100,00</b>

**Note: the minimum score for functionality is 70 points.**

- Please note that the Evaluation Committee will use their own discretion to assess quality of all bid proposals received in relation to above functionality criteria and may further verify information submitted from relevant sources/your clients and use their own discretion to score the bidders proposal accordingly.
- It is the responsibility of the bidder to seek clarity by enquiry before submission of the final bid, where the criteria are construed to be ambiguous or confusing. Should there be a difference of interpretation between the bidders and FoodBev SETA, the SETA reserves the right to make a final ruling on such interpretation.



- FoodBev SETA may request clarification or additional information regarding any aspect of the tender document or proposal submitted. The bidders must supply the requested information within forty-eight (48) hours after receipt of written request from supply chain office. Failure to submit such information may result in disqualification or non-award of functionality points.

## 7. CRITERIA 3: PREFERENCE POINTS ALLOCATION

Bid will be evaluated based on the PPPFA 80/20-point system as presented in the Preferential Procurement Regulations 2017, for this purpose SBD 6.1 form should be scrutinized, completed, and submitted together with your quotation. The 80/10-point system will be as follows:

CRITERIA	SUB-CRITERIA	POINTS
Price	Detailed budget breakdown	80
BBBEE Status Level Verification certificate from accredited verification agencies	BBBEE Level Contributor	20
<b>Total Points</b>		<b>100</b>

## 8. CONDITIONS OF CONTRACT

### The successful service provider undertakes:

- 8.1. To treat all relevant and available data and/or information provided by the FoodBev SETA and its employees strictly confidential;
- 8.2. Not to discuss or make any information available to any member of the public, press or other service provider/consultant or any other unauthorized person(s) except as authorised by the FoodBev SETA;
- 8.3. Not to copy or duplicate any software or documentation for private use;
- 8.4. To give back to the FoodBev SETA all documentation, reports, programmes etc. upon completion of the project;
- 8.5. General conditions of tender, contracts and orders will be applicable in the execution of the contract;
- 8.6. Parking and travel between the prospective service provider's home/office and the FoodBev SETA will be borne by the Service Provider;
- 8.7. Failure to adhere to the above conditions will lead to the invalidation of the quotation;
- 8.8. The FoodBev SETA reserves the right to discontinue work on any element of the quotation at any given time in consultation with the Senior Manager: Human Resources of the FoodBev SETA, for example the quality of work delivered is poor or the service provider is unduly delaying delivery of service;
- 8.9. Enter into a Service Level Agreement with the FoodBev SETA before the final acceptance of the tender proposal.
- 8.10. The Contract/SLA may be finalised within a period of maximum of five (5) working days for signature before commencement of the work. Bidders must note that FoodBev SETA contracts are vetted by outsourced lawyers therefore it is important to note that it is the responsibility of the bidder to also vet their contract before signing it off.



## **9. IMPORTANT INFORMATION TO NOTE - GUIDELINES**

### **9.1. Disclosures**

Bidder to disclose if they have been subject to proceedings or other arrangements relating to bankruptcy or insolvency

### **9.2. Disclaimer**

FBS reserves the right not to appoint a service provider

Not to appoint a bid that scored the highest points i.e., award a bid, on reasonable and justifiable grounds, to a bidder that did not score the highest points

Award the contract or any part thereof to one or more service providers

Reject all bids

Decline to consider any bids that do not conform to any aspect of the bidding requirements

Request further information from any bidder after closing date for clarity purposes

Cancel this RFQ or any part thereof at any time

Require the shortlisted bidders to make presentations at the venue communicated with the bidder and this presentation will be made by bidder at their own cost

Points scored will be rounded to 2 decimals

### **9.3. Confidentiality**

Bids submitted will not be revealed to any other bidders and will be treated with utmost confidentiality. All information pertaining to FBS obtained by the bidder as a result of participation in this RFP is confidential and must not be disclosed without written authorisation from the FBS. The project lead will abide by FBS Code of Conduct and all laws, rules and regulations that govern the SETA.

### **9.4. Miscellaneous**

The service provider should include any additional information deemed useful to the FoodBev SETA in evaluating the proposal.

### **9.5. Negotiations**

FoodBev SETA will enter into negotiations to agree on fees, scope of work, scope of service, and other salient commercial terms with the preferred bidder.

### **9.6. Validity**

The proposal provided to FoodBev SETA in terms of this request for quotations will be valid for a period of 90 days from the date of submission with the exception of the Tax and B-BBEE certificates which must still be valid at the time of award. Should there be a need to request extension of the finalization of the award of the bid, the bidders will be duly informed, and the tender/proposal will remain valid except for items mentioned above.

### **9.7. Conditions of payment**

No service should be provided to FoodBev SETA before an official purchase order has been issued to the supplier. An invoice supported by all relevant documentation must be submitted to FoodBev SETA for certification and authorization before payment can be made. Invoices will be payable 30 days after receipt of the invoice and statement.





**9.8. Cost of tendering/ providing quotations**

The bidders shall bear all costs and expenses associated with the preparation and submission of the tender document/proposal. FoodBev SETA shall under no circumstances be responsible and/or liable for any such costs, regardless of, and without limitation to the conduct or outcome of the tendering, evaluation, and selection process. The bidder will have no claim against FoodBev SETA where bids are cancelled for whatever reason.

**9.9. Unsuccessful bidders**

Please note FoodBev SETA decision on the selection of the successful bidder is final and FoodBev will not enter into any further correspondence and/or negotiations with any unsuccessful bidder.

**10. PROCEDURES FOR SUBMITTING QUATATIONS**

**10.1. The closing date for proposals is 22 August 2022 at 11:00 a.m.**

Suppliers must reach the FoodBev SETA before or on the closing date and time. Bidders must email a soft copy of their proposal to: [scm@foodbev.co.za](mailto:scm@foodbev.co.za).

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**Reviewed and supported by: Ms Thuli Sibia (Senior Manager: RPM&E)**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**Reviewed and approved by: Ms Nokuthula Selamolela**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

