 <p>Transport Education Training Authority <i>Driven by Vision</i></p>	<p>TERMS OF REFERENCE</p>
<p>Purpose:</p>	<p>PROCUREMENT OF A SERVICE PROVIDER TO EVALUATE 2026/2027 DISCRETIONARY GRANTS</p>

1. OVERVIEW OF TETA

The Transport Education and Training Authority (TETA) was re-established by the Minister of Higher Education and Training for the period 01 April 2020 to 31 March 2030. Transport Education and Training Authority (TETA) was established in terms of the Skills Development Act (SDA) of 97 of 1998, as amended. TETA is committed in facilitating and ensuring that through the National Skills Plan, South Africa will have a pool of highly skilled, competitive and competent people trained in the various facets of the transport sector (Rail, Aerospace, Maritime, Road Freight, Road Passenger, Taxi, Freight Handling and Forwarding & Clearing) to address the country's skills shortage and demand for scarce and critical skills.

2. BACKGROUND

The Transport Education and Training Authority is a Schedule 3A public entity established in terms of the Skills Development Act, 1998, and accountable under the Public Finance Management Act, 1999. TETA is responsible for the prudent administration of levy income, the implementation of discretionary and mandatory grants, and the delivery of sector skills outcomes in compliance with national legislation and public finance prescripts.

To strengthen institutional governance, stabilize operational performance, and address persistent audit findings, the Accounting Authority has approved the establishment of an Interim Internal Project Management Office. The IPMO is composed of people appointed by the Chief Executive Officer to discharge his/her delegated functions and responsibilities. The IPMO is presided over by the Chief Executive Office or such other authorized person. The Interim Internal PMO is established to provide a centralized governance and coordination capability to:

- Stabilise project and delivery programme
- Coordinate audit remediation
- Maintain oversight of grants implementation and expenditure

- Support ICT stabilisation initiatives
- Ensure continuity during procurement and transition to an external PMO capability
- Retain institutional knowledge and embed sustainable systems

The interim Project Management Office produced a 2026/2027 Discretionary Grant notice regarding grant opportunities and the areas of focus for the attainment of national priorities, DHET areas, Strategic Plan and 2026/27 Annual Performance targets, strategic objectives in the transport sector. The notice closed on 31 March 2026, and TETA has received proposals that need to be evaluated to implement 2026/27 targets.

3. PROJECT PURPOSE

The purpose of this Terms of Reference is to appoint an independent and suitably qualified service provider to conduct an **evaluation of all applications submitted under the readvertised DG Window of the 2026/2027 Discretionary Grant cycle.**

4. SCOPE OF THE ASSIGNMENT

The work will include:

- Obtain TETA data to compile a list of all applications for discretionary grants for 2026/2027 financial year in collaboration with the Interim Project Management Office requirements,
- Assess each application against the TETA approved DG Guidelines and prescribed requirements.
- Verify the completeness and validity of documentation submitted by all grant applicants in relation to Tax status, CSD, Accreditation, Workplaces, Workplace Approval and Applicant Budget alignment with 26/27 approved funding framework
- Assess alignment of applications to 26/27 Annual Performance Plan (APP), Strategic Plan and national priorities and approved Sector Skills Plan.
- Adapt evaluation schedules of all applicants based on TETA guidance to confirm clearly, names and registration of entity and status, type of training or project, business address and contact details,

credits, number of learners, whether entity blacklisted or prohibited to do business with state, compliance status, evaluation outcomes and registration/deregistration status

- Preparing schedule of both compliant and non-compliant applicants for consideration by the Grant Adjudication Committee for consideration and decision.

The service provider must provide reports through structures and templates that will be prescribed by the Interim Project Management to support timely decision making.

NB. TETA will arrange a briefing session with the successful independent service provider.

5. EVALUATION CRITERIA

This bid will be evaluated in three (3) stages as follows:

Stage 1 - Pre-Compliance (Administrative Compliance) Evaluation

- Mandatory Requirements
- Administrative Requirements

Stage 2 – Quality Proposal Evaluation

Stage 3 - Price and Specific Goals Evaluation

6. PRE-COMPLIANCE EVALUATION - (STAGE 1)

After the receipt of bids, Supply Chain Management Unit will conduct administrative compliance of bid submissions based on the following mandatory and non-mandatory requirements:

6.1 MANDATORY REQUIREMENTS

Bidders who fail to meet the following mandatory requirements will be disqualified at Pre-Compliance Phase:

Criterion	Requirement
Pricing / Costing Schedule	<ul style="list-style-type: none"> • Submit the Pricing Proposal / Costing Schedule Electronic submission via email to Supply Chain Department.
Declaration of Interest (SBD 4)	<ul style="list-style-type: none"> • The bidder must fully complete and sign the Declaration of interest form electronically or in black ink.
SARS Pin / CSD Supplier Number	<ul style="list-style-type: none"> • The bidder must submit a SARS Pin with expiry date to assist with verification of Tax Affairs. • If SARS Pin is not submitted provide CSD Supplier Number
Central Supplier Database Registration	<ul style="list-style-type: none"> • The bidder must be registered as a supplier with Treasury on www.csd.gov.za. (Please attach proof).
Company Experience	<ul style="list-style-type: none"> • The bidder must have a minimum of three (3) years' experience conducting evaluation of DG grant evaluation. The experience will be evaluated from the letters provided and a

	<p>completed experience schedule.</p> <p>NB. Complete the respective schedule of the Request for Bid (RFB)</p>
Reference Letters for the Company.	<ul style="list-style-type: none"> The bidder must submit reference letters not older than five (5) years indicating their relevant experience in evaluating grants.
Project Leader Experience	<ul style="list-style-type: none"> The Project Leader must have at least six (6) years' experience as a Project Leader in the strategic execution of similar projects AND possess at least an NQF level 8 qualification, must be a qualified and registered Chartered Accountant. <p>NB. Complete the respective schedule of the Request for Bid (RFB)</p>
Project Manager Experience	<ul style="list-style-type: none"> The project manager must have at least five (5) years' experience as a Project Manager in the day-to-day execution/ implementation of similar projects AND possess at least an NQF level 7 qualification. <p>NB. Complete the respective schedule of the Request for Bid (RFB).</p>
Audit and Governance Expert	<ul style="list-style-type: none"> The Audit Specialist must have at least five years' experience in auditing and governance AND possess an NQF 7 qualifications <p>NB. NB. Complete the respective schedule of the Request for Bid (RFB).</p>
Data Analyst	<ul style="list-style-type: none"> The data analyst must have at least five years' experience in analyzing qualitative and quantitative data AND possess an NQF 7 qualifications <p>NB. Complete the respective schedule of the Request for Bid (RFB).</p>
Submission of Project Technical Approach and Methodology	<ul style="list-style-type: none"> The bidder must submit a proposal with a clear technical approach and methodology on how they intend to implement the evaluation of grant applications and/or proposals.
Company experience	<ul style="list-style-type: none"> The company must have a minimum of three (3) years' experience in the provision of Evaluation of Grant applications. <p>NB. Complete the Company Experience Schedule</p>
Human Resource Capacity	<ul style="list-style-type: none"> The Service Provider must provide a list of dedicated key personnel, other than the Project Leader to be involved in this project including their positions in the company and CVs (detailing their qualifications and experience). NB. Please provide certified copies of the qualification certificates not older than six (6) months. (not copies of certified copies)

6.2 ADMINISTRATIVE REQUIREMENTS

As part of the administrative compliance evaluation, the bidder must also furnish the following documents:

Criterion	Requirement
Human Resource Capacity	<ul style="list-style-type: none"> The Service Provider must provide a list of dedicated key personnel, other than the Project Leader to be involved in this project including their positions in the company and CVs (detailing their qualifications and experience). NB. Please provide certified copies of the qualification certificates not older than six (6) months. (not copies of certified copies)
B-BBEE Certificate	<ul style="list-style-type: none"> Preference Points Schedule (B-BBEE) form SBD 6.1 must be completed and signed. A certified copy of the B-BBEE Certificate must be submitted (not a certified copy of a copy). Submit a valid BBBEE Verification Certificate from SANAS Accredited Verification Agency. The Qualifying Small Enterprise (QSE) and Exempted Micro Enterprises (EME) must submit a sworn affidavit stamped and signed by the Commissioner of Oath confirming the Company Annual Total Revenue and level of black ownership. Failure to submit a valid B-BBEE Certificate will result in a bidder losing preference points. In a case of a JV, a combined B-BBEE Certificate must be submitted together with a JV Agreement signed by both parties
CIPC Documents	<ul style="list-style-type: none"> The bidder must provide certified copies of Company / Close corporation registration certificates issued by CIPC.

Criterion	Requirement
	<ul style="list-style-type: none"> Bidders must confirm their company registration with CIPC as TETA will not award any tender to any business that appears on the CIPC List of de-registered businesses.
Identity Documents of Directors/Owners or List of Directors	<ul style="list-style-type: none"> Certified copies of Directors/Owners Identity Documents OR List of directors <p>NB. Documents are needed to claim for Specific Goals.</p>
Banking Details	<ul style="list-style-type: none"> Signed and bank stamped banking details
General Conditions of Contract/Bid	<ul style="list-style-type: none"> The bidder must accept General Conditions of Contract / Bid and provide full and accurate answers posed in this section.
Letter of Authority of Signatory	<ul style="list-style-type: none"> The bidder is required to provide a Letter of Authority of Signatory to sign the bid submission, signed and in the company's Letter Head.

7. QUALITY EVALUATION – (STAGE 2)

TETA applies the provisions of the **Preferential Procurement Policy Framework Act**, (Act no. 5 of 2000) and the **Preferential Procurement Policy Framework Act Regulations of 2022**.

The following values will be applied to score functionality:

Values: 1 = Poor 2 = Average 3 = Good 4 = Very Good 5 = Excellent

Item No.	TECHNICAL EVALUATION:	Weighting
1. Project Leader's Experience	<p>The Project Leader must have at least six (6) years' experience as a Project Leader in the strategic execution of similar projects AND possess at least an NQF level 8 qualification.</p> <ul style="list-style-type: none"> More than 7 years' relevant experience – Excellent (5) More than 6 years but less than 7 years' relevant experience – Very Good (4) 6 Years relevant experience – Good (3) <p>NB: Complete experience schedule. List experience in a table format indicating institutions where similar projects were undertaken.</p>	30

<p>2. Project Manager Experience</p>	<p>The project manager must have at least five (5) years' experience as a Project Manager in the day-to-day execution/ implementation of similar projects AND possess at least an NQF level 7 qualification.</p> <ul style="list-style-type: none"> • More than 6 years' relevant experience – Excellent (5) • More than 5 years but less than 6 years' relevant experience – Very Good (4) • 5 Years relevant experience – Good (3) <p>NB: Complete experience schedule. List experience in a table format indicating institutions where similar projects were undertaken.</p>	<p>10</p>
<p>3. Audit and Governance Expert</p>	<p>The audit and governance must have at least five (5) years' experience as an audit and governance advisor in relation to the execution/ implementation of similar projects AND possess at least an NQF level 7 qualification.</p> <ul style="list-style-type: none"> • More than 6 years' relevant experience – Excellent (5) • More than 5 years but less than 6 years' relevant experience – Very Good (4) • 5 Years relevant experience – Good (3) <p>NB: Complete experience schedule. List experience in a table format indicating institutions where similar projects were undertaken.</p>	<p>10</p>
<p>4. Data Analyst</p>	<p>The data analyst must have at least five (5) years' experience as a in qualitative and quantitative analysis if data in relation to the execution/ implementation of similar projects AND possess at least an NQF level 7 qualification.</p> <ul style="list-style-type: none"> • More than 6 years' relevant experience – Excellent (5) • More than 5 years but less than 6 years' relevant experience – Very Good (4) • 5 Years relevant experience – Good (3) <p>NB: Complete experience schedule. List experience in a table format indicating institutions where similar projects were undertaken.</p>	<p>10</p>

5. Company Experience	EXPERIENCE – SERVICE PROVIDER (20 POINTS)		20
	<ul style="list-style-type: none"> The bidder must have a minimum of three (3) years' experience conducting evaluation of DG grant evaluation. The experience will be evaluated from the letters provided and a completed experience schedule. 		
	<p style="color: red;">NB. TETA reserve the right to contact references furnished.</p>		
	5 Years and above	Excellent (5)	
	More than three (3) years to less than five years	Very Good (4)	
3 years	Good (3)		
Less than 3 years	Poor (0)		
<p style="color: red;">NB. Complete the respective schedule of the Request for Bid (RFB)</p>			

Item No.	TECHNICAL EVALUATION:	Weighting
6. Project Technical Approach and Methodology	<p>NB: Process outlined will form part of the SLA</p> <p>The bidder must:</p> <ul style="list-style-type: none"> . The bidder must submit a proposal with a clear technical approach and methodology on how they intend to implement the evaluation of grant applications and/or proposals. • Methodology is detailed includes the three (3) elements outlined below: Score - (20) <ul style="list-style-type: none"> . Provide a detailed proposed project plan to achieve the objectives. . Demonstrate the ability to carry out the task. . Demonstrate that the bidder has the appropriate resources (i.e. personnel and tools) to execute the plan. • Methodology does not include any of the outlined three (3) outlined elements mentioned above: Score (0) 	20
	Total	100

NB: Bidders that score less than 70 points out of 100 points on Quality Evaluation will not be evaluated further on Price and Specific Goals Evaluation.

8. PRICE AND SPECIFIC GOALS EVALUATION CRITERIA (STAGE 3)

8.1.1 Price Evaluation

TETA applies the provisions of the **Preferential Procurement Policy Framework Act, (Act no.5 of 2000)** and the **Preferential Procurement Policy Framework Act Regulations of 2022.**

Preferential points will be allocated using 80/20 as follows: Criteria	Points
Price	80
Specific Goals	
B-BBEE status of level contributor	10
Other Specific Goals	10
Total	100

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

Where

Ps = Points scored for price of tender under consideration

Pt = Rand value of tender under consideration

Pmin = Price of lowest acceptable tender

8.1.2 Specific Goals Evaluation

The following Table will be used to allocate the scores as this is an 80/20 bid:

B-BBEE Status Level of Contributor	Number of Points (80/20)
1	10
2	9
3	7
4	6
5	4
6	3
7	2
8	1
Non-compliant contributor	0
Other Specific Goals	10
1. Who had no franchise in national elections before 1983 and 1993 Constitutions	3
2. Who is a female	3
3. Who has disability	2
4. Who is young (youth)	2

NB: The bid will be awarded to a bidder who scores the total highest points on Price and Specific Goals unless there is a compelling reason not to award the bid to the highest point scorer.

9. COST PROPOSAL

Please provide prices broken down as per table below. The service provider must at least indicate the following costs for the assignment:

PROFESSIONAL FEES					
	Rate per Hour (Excl. Vat)	Rate per Hour (Incl. Vat)	Rate per Day (Excl. Vat)	Rate per Day (Incl. Vat)	VAT Rate
Project Lead					15%
Project Manager					15%
Evaluators					15%
Administrators					
Other (specify)					15%

The SETA receives an estimated number of 1881 proposals/applications from the discretionary grants window that was published on the 06 December 2024.

DISBURSEMENTS

	Amount (Excl. Vat)	VAT	Amount (Incl. Vat)	Vat Rate
Telephone calls per minute				15%
Photocopying per page				15%
Printing per page				15%
1 Telefax per page				15%
Travelling charges per kilometre				15%
Any Other (specify)				15%

N.B. For all service providers, resources that will be considered are only those that were evaluated by TETA for these assignments.

10.REPORTING FRAMEWORK AND SCHEDULING

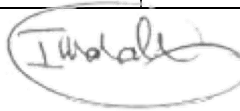
The successful service provider will be reporting to the heads of the of the Interim Project Management Office on all aspects of the services to be rendered.

NB. The total price to be used for evaluation purposes will be the total average price for all costed items on Professional Fees.


11.CONTRACT PERIOD

The period of the service required cannot be established at the moment based on other factors that may affect the processes.

12.APPROVAL

RECOMMENDATION BY THE USER DEPARTMENT				
	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Recommended		Not recommended		
Head of Interim PMO	Adv Ishmael Malale	Signature:		Date: 21 May 2026

APPROVAL BY SCM

<input checked="checked" type="checkbox"/>		<input type="checkbox"/>	
Approved		Not Approved	
SCM MANAGER	Mr. Zukisani Mangaliso	Signature: 	Date: 21 May 2026

ANNEXURE A: SCHEDULE OF THE COMPANY'S EXPERIENCE

LIST OF REFERENCES COMPANY NAME: _____

No.	Name of Institution	Project Description	Project Start Date (dd/mm/yyyy)	Project End Date (dd/mm/yyyy)	Name of Reference	Contacts Details of Reference	
						Telephone No.	Email Address
1.							
2.							
3.							
4.							
5.							
6.							
7.							

ANNEXURE B: SCHEDULE OF EXPERIENCE OF PROJECT LEADER: LIST OF REFERENCES

PROJECT LEADER NAME: _____

No.	Name of Institution	Project Description	Project Start Date (dd/mm/yyyy)	Project End Date (dd/mm/yyyy)	Name of Reference	Contacts Details of Reference	
						Telephone No.	Email Address
1							
2							
3							
4							
5							
6							
7							

ANNEXURE C: SCHEDULE OF EXPERIENCE OF PROJECT MANAGER: LIST OF REFERENCES

PROJECT MANAGER NAME: _____

No.	Name of Institution	Project Description	Project Start Date (dd/mm/yyyy)	Project End Date (dd/mm/yyyy)	Name of Reference	Contacts Details of Reference	
						Telephone No.	Email Address
1							
2							
3							
4							
5							
6							
7							

ANNEXURE D: SCHEDULE OF EXPERIENCE OF AUDIT AND GOVERNANCE EXPERT: LIST OF REFERENCES

AUDIT AND GOVERNANCE EXPERT NAME: _____

No.	Name of Institution	Project Description	Project Start Date (dd/mm/yyyy)	Project End Date (dd/mm/yyyy)	Name of Reference	Contacts Details of Reference	
						Telephone No.	Email Address
1							
2							
3							
4							
5							
6							
7							

ANNEXURE E: SCHEDULE OF EXPERIENCE OF DATA ANALYST: LIST OF REFERENCES

DATA ANALYST NAME: _____

No.	Name of Institution	Project Description	Project Start Date (dd/mm/yyyy)	Project End Date (dd/mm/yyyy)	Name of Reference	Contacts Details of Reference	
						Telephone No.	Email Address
1							
2							
3							
4							
5							
6							
7							