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Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 269 - 2018/19

REQUEST FOR QUOTATION

TERMS OF REFERENCES FOR THE APPOINTMENT OF A TRAINING PROVIDER TO OFFER TRAINING TO THE ETDP SETA RECEPTIONISTS AND ADMINISTRATORS ON CUSTOMER CARE

1. INTRODUCTION

The Education Training and Development Practices - Sector Education and Training Authority (ETDP SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act, No 97 of 1998 (as amended) to advance skills levels in accordance with the National Skills Development Strategy III.

The ETDP SETA is looking for a training provider to offer training to Receptionists and Administrators, on the following:

Brief Description

*Training programme for Receptionists staff to improve their customer service and telephone handling skills. **Telephone Etiquette & Customer Service***

Key learning areas that should be covered:

- Clarify what is meant by customer service
- Explore who our customers are and what their diverse needs are
- Two way communication: open ended questions
- Use questioning techniques to identify specific needs of customers
- Explore the values and attitudes necessary for excellence in customer care
- Discuss my role and responsibilities when serving customers
- Dealing with customer queries effectively and efficiently
- How to handle conflict and conflict resolution techniques
- How to handle difficult customers and abusive callers
- Explain the importance of product knowledge in customer care
- Understanding how to deal with Confidential and non – disclosable information
- Courteousness in receiving walk in clients

The workshop should be scheduled over three (3) days, according to the course program provided by the provider for the three days.

ETDP SETA has a total of 20 members to be trained.

The ETDP SETA reserves the right not to award the bid to any training provider.



higher education & training
Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

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2. PROFILE OF THE TRAINING PROVIDER

A) FUNCTIONAL RESOURCES

(i) The Training Provider should provide;

- a. Resource packs to be provided to the Receptionists and Administrators.
- b. Qualified Facilitator(s)
- c. Certificates of attendance to be issued to all attendees by the provider

(ii) SETA will Provide:

- a. The SETA will arrange a Training venue and lunch to accommodate all 20 Receptionist and Administrators – central point in Gauteng.

3. COURSE CONTENT/OUTCOMES

Objective

- Delegate should leave with an understanding of how to deal with difficult customers, listening skills , telephone skills

Outcomes:

By the end of the course, participants should be able to:

- Understanding the full use of the telephone equipment
- Dealing with incoming calls as efficiently and politely as possible
- Stress the importance of acknowledging callers and keeping them informed at all times
- Describe standard telephone etiquette for answering calls, transferring calls and making calls
- Understand how to operate the telephone and equipment
- Ask probing questions to find out the purpose of the call and transfer to the correct person or department
- Capturing and logging the customer query on the computer information system
- Resolving customer queries promptly
- Prepare all necessary documentation and equipment prior to making an outgoing call
- Speaking eloquently and clearly on the phone
- Developing an understanding of Customer requirements by listening
- Taking PRIDE in displaying courtesy and civility to others
- Display courtesy in receiving walk in clients

4. COSTING MODEL (PRICE SCHEDULE)

COST COMPARISON FOR THE TRAINING OF RECEPTIONISTS AND ADMINISTRATORS

THIS COSTING MODEL MUST NOT BE MODIFIED AT ALL AND IF RETYPED ALL LINE ITEMS IN ORDER AS STATED BELOW TO BE INCLUDED.

Name of Organisation:		
ITEM DESCRIPTION	AMOUNT	COMMENTS
Printing of manuals		Provider to use own learning material.
Facilitation of training for 3 days		
Printing of attendance certificates		
SUB-TOTAL		
TOTAL COSTS VAT INCL		

5. EVALUATION CRITERIA

The ETDP SETA applies the provisions of the **PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000** and **Preferential Procurement Regulations, 2017**. The evaluation will be guided by **ETDP SETA procurement policy**.

5.1. STAGE 1

Bidders will be evaluated on the administration of the **Mandatory documents requested**.

5.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION

1. A description / Profile of the organization
2. Valid Tax Clearance Certificate *or Unique security personal identification number (PIN) issued by SARS"*
3. Declaration of Interest – **SBD 4**
4. Declaration of Bidder's Past Supply Chain Practices – **SBD 8**
5. Certificate of Independent Bid Determination – **SBD 9**

NB: Failure to submit any of the above documents will lead to disqualification.

5.2. STAGE 2

In this stage, the evaluation of bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid document.

- (a). The minimum qualifying score for functionality will be **70 points** and bids that fail to achieve the minimum qualifying score will be eliminated.

- (b). Only bids that achieved the minimum qualifying score/ percentage for functionality will be evaluated further in accordance with the **80/20 preference point systems prescribed in Preferential Procurement Regulations 5 and 6.**

The evaluation criteria for functionality will be as below:

NO	QUALIFYING CRITERIA FOR SHORT LISTING	POINTS
1.	<ul style="list-style-type: none"> ▪ Experience in business doing similar training on customer service for reception staff ; <ul style="list-style-type: none"> a. 5 yrs Plus = 15 b. 3 - 4yrs = 10 c. 1 – 2yrs = 5 ▪ Contactable reference - 15 <ul style="list-style-type: none"> • Three (3) reference = 15 	30
2.	Implementation of the training; <ul style="list-style-type: none"> • Structure project plan to denote the key learning areas over 3 days = 20 • Method and delivery of learning program = 30 • Provide proof of qualifications of the facilitators (Attach CV) = 20 <ul style="list-style-type: none"> - 5 Yrs plus = 20 - 3-4 Yrs = 15 - 1-2 Yrs = 10 	70
TOTAL		100

Bidders must provide sufficient proof/documents to justify awarding the above points, and such proof should include details of contactable references to Evaluation Criteria (Stage 1) above. Points will be awarded on a sliding scale.

Please take note of the value and scoring point system of your proposed bid.

5.3. STAGE 3

PRICING SCHEDULE DOCUMENTS

- a. Invitation to Bid - **SBD1 (Price must be final, include VAT and signed)**
- b. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 - **SBD 6.1 (If claiming preferential points)**

80/20 preference point system shall be applicable as follows:

- Price **80**
- B-BBEE status level of contributor **20**

In order to facilitate a transparent selection process that allows equal opportunity to all service providers, the ETDP SETA will adhere to its policy on the appointment of service providers.

6. BID CONDITIONS

The ETDP SETA Supply Chain Management Policy will apply:

1. ETDP SETA does not bind itself to appoint a bidder with the highest points.
2. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
3. Bids which are late, incomplete and unsigned will not be accepted.
4. Bidders with a **turnover above R 10 million** must submit a valid certified B-BBEE Verification Certificate from **SANAS Accredited Verification Agency** in order to be eligible for empowerment points.
5. An Exempted Micro Enterprise (EME) is only required to submit a sworn affidavit or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming their annual turnover of R 10 million or less and level of black ownership to claim points.
6. A Qualifying Small Enterprise (QSE), is required to submit a sworn affidavit confirming their **annual total revenue of between R 10 million and R 50 million** and **level of black ownership** or a B-BBEE level verification certificate to claim points as prescribed.
7. **B-BBEE Certificates obtained from Accountants/ Auditors after 31 December 2016 will no longer be accepted.**
8. Companies who bid as a joint venture must submit a **consolidated B-BBEE Verification certificate prepared for this bid only**, from **SANAS Accredited Verification Agency** in order to be eligible for empowerment points. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.
9. Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor, sworn affidavit or a B-BBEE Certificate, together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
10. Bids submitted are to hold good for a period of 90 days.
11. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
12. All suppliers must be registered on the **Central Supplier Database**. No bid will be awarded to any supplier by ETDP SETA that is not registered on the Central Supplier.
13. Companies that are in the process of **de-registration in the CIPC** will not be considered.
14. The successful service provider **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.

7. SUBMISSION OF BIDS

Bid documents for participation **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za, Main Menu > Supply Chain Management > Procurement > Request for Quotation as from **12h00 on 31 January 2019**.

Bidders must submit technical and financial quotations via email to TienieJ@etdpseta.org.za or etdpsetarfq@etdpseta.org.za

OR

Quotations may be **courier delivered or hand delivered to:**

**The ETDP SETA – Head Office
ETDP SETA House
2-6 New Street
Ghandi Square
Johannesburg South - CBD
2091**

Submissions must be delivered into the tender box or via email between **08h00 and 16h30 Monday to Friday BEFORE** the closing date of **07 February 2019 at 11h00**.

8. CLOSING DATE AND TIME

All RFQs should reach the ETDP SETA Offices on or before 11H00 on 07 February 2019.

No late submission will be accepted!

9. ENQUIRIES AND CONTACT PERSON

NO telephonic or any other form of communication relating to this bid will be permitted with any other ETDPSETA member of staff either by Bidders (as collective bidding team or individual of the bidding team), representative of Bidders, associates of Bidders, shareholders of Bidders, other than with the named individual stated below. ANY MEANS OF ATTEMPTING TO INFLUENCE THE ADJUDICATION PROCESS OR OUTCOMES OF THE ADJUDICATION PROCESS WILL RESULT IN IMMEDIATE DISQUALIFICATION OF THE ENTIRE BID. All enquiries regarding this bid must be in writing only and be directed to:

Supply Chain Manager: Email: tenderers@etdpseta.org.za

Note: Blacklisted companies appearing on the National Treasury database and prohibited from conducting business with public entities, will be disqualified.

No late bid/bids will be accepted. Price bids submitted through email will be acceptable.

Bids can be submitted to TienieJ@etdpseta.org.za or etdpsetarfq@etdpseta.org.za