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Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 09 - 2022/23 – RE - ADVERTISEMENT**REQUEST FOR QUOTATIONS**

TERMS OF REFERENCES TO CONDUCT RESEARCH ON STATUTORY BODIES INCLUSIVE OF SECTOR EDUCATION AND TRAINING AUTHORITIES (SETAS), QUALITY ASSURANCE AND PROFESSIONAL BODIES AS AN ETD SUBSECTOR FOR THE PURPOSE OF 2023/24 SECTOR SKILLS PLAN (SSP) UPDATE.

1. INTRODUCTION

In accordance with the Skills Development Act, 2008 section 10(a) each Sector Education and Training Authority (SETA) is required to develop a Sector Skills Plan (SSP) within the framework of the National Skills Development Strategy (NSDS) (now known as the Skills Development Plan (NSDP). The SETAs are mandated to promote skills development in their designated sectors. This process involves sector planning research to ensure that public investments in the skills development resonate with the needs of the SETA's constituencies and key government economic and social priorities. In this regard, the SETAs are tasked to develop and submit Sector Skills Plan (SSP) Annual Updates to the Department of Higher Education and Training (DHET).

The ETDP SETA reserves the right not to award this RFQ.

2. PURPOSE & OBJECTIVES**2.1. PURPOSE OF THE PROJECT**

The ETDP SETA would like to contract a research partner to conduct research that will provide empirical data and labour market related information to inform the SSP update for 2023/24. The research partner appointed will be allocated the Statutory Bodies inclusive of SETAs, quality assurance and professional bodies subsector.

2.2. OBJECTIVES

The main focus of this project is to gather, analyse and validate short, medium and long-term empirical data relating to the subsector profile, key skills issues, occupational shortages and skills gaps, subsector partnerships as well as skills priorities for the subsector across all Statutory Bodies inclusive of SETAs, quality assurance and professional bodies.

3. PROJECT SCOPE AND REQUIREMENTS

- 3.1. The scope of work is to conduct research for the Education, Training and Development (ETD) Sector Skills Plan (SSP) with specific focus on Statutory Bodies inclusive of SETAs, quality assurance and professional bodies for the period 2022/2023. The main focus of this project is to gather, analyse and validate short, medium and long-term empirical data relating to the subsector profile, key skills issues, occupational shortages and skills gaps, subsector partnerships as well as skills priorities for the subsector across all Statutory Bodies inclusive of SETAs, quality assurance and professional bodies. The research partner will be expected to follow the latest Department of Higher Education and Training SSP Framework and Guidelines in the compilation of the report of this project.
- 3.2. The appointed research partner must have in place a capacity building plan to transfer skills to the ETDP SETA staff of the Skills Planning and Research Unit and this must form part of the project plan to be submitted.
- 3.3. The appointed research partner will report to the Senior Research Specialist of the ETDP SETA through the draft project plans by the partner. These project plans will indicate timelines, milestones and deliverables for the project. The draft project plans will be an annexure of the Service Level Agreement (SLA) and form the basis for monitoring and reporting. The appointed research partner will work closely with the Skills Planning and Research Unit to collectively plan the methodology, activities, timelines and deliverables. However, these must form part of the bidding by the research partner. The service provider should have the expertise in conducting research that will provide authentic data and labour market related information to inform the SSP update for 2023/24.
- 3.4. The service provide should have the expertise in conducting research that will provide authentic data and labour market related information to inform the SSP update for 2022/23.
- 3.5. Payment will be made in accordance with agreed payment schedule contained in the SLA and must be denominated in South African Rand value. The researcher should submit a detailed **ALL INCLUSIVE-Budget** for the project. No additional fees will be entertained thereafter.

4. DELIVERABLES

The key deliverables for this project are as follows:

- I. **Project Execution Plan (or Inception Report)**
 - A detailed work plan outlining the research methodological approach, resource tools and allocation, costs, timelines (realistic and with key milestones) and deliverables including provincial/institutional consultations.
- II. **Raw data report**
 - Raw data report showing emerging trends from the data collected
 - Raw data report needs to show the methodology followed
 - Raw data report needs to show the list of participants
- III. **Draft Report of the key findings and conclusions**, which includes;

- Updated Statutory Bodies inclusive of SETAs, quality assurance and professional bodies sections of the five (5) chapters of the SSP; Chapter 1= Sector Profile, Chapter 2 = Key Skills Change Drivers, Chapter 3 = Occupational Shortages and Skills Gaps, Chapter 4 = Sector Partnerships, and Chapter 5 = Skills Priority Actions
 - Stakeholder Consultations, In-depth interviews and Workshops with ETDP SETA stakeholders for the purpose of finalising the report.
- IV. **Final Subsector Report on Statutory Bodies inclusive of SETAs, quality assurance and professional bodies according to the SSP five (5) chapters.**

5. DURATION OF THE AGREEMENT

The work is expected to be completed within the period of Twelve **(12) months** after the signing of the Service Level Agreement **(SLA)**.

6. COSTING MODEL (PRICING SCHEDULE)

The Bidder must provide a signed costing proposal on the company letterhead. The bidder's proposal costing should clearly indicate the following cost:

Name of Organisation:			
ITEM DESCRIPTION	Hourly Rate Inc VAT	Total Fee per day Inc VAT	Total Cost (Inc VAT)
Project Execution Plan (or Inception Report) - A detailed work plan outlining the research methodological approach, resource tools and allocation, costs, timelines (realistic and with key milestones) and deliverables including provincial/institutional consultations.			
Raw data report - Raw data report showing emerging trends from the data collected - Raw data report needs to show the methodology followed - Raw data report needs to show the list of participants			
Draft Report of the key findings and conclusions, which includes; - Updated Statutory Bodies inclusive of SETAs, quality assurance and professional bodies sections of the five (5) chapters of the SSP;			

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Chapter 1= Sector Profile, Chapter 2 = Key Skills Change Drivers, Chapter 3 = Occupational Shortages and Skills Gaps, Chapter 4 = Sector Partnerships, and Chapter 5 = Skills Priority Actions - Stakeholder Consultations, In-depth interviews and Workshops with ETDP SETA stakeholders for the purpose of finalising the report.			
Final Subsector Report on Statutory Bodies inclusive of SETAs, quality assurance and professional bodies according to the SSP five (5) chapters (with proof of language editing) PowerPoint presentation			
SUB-TOTAL			
VAT @ 15%			
TOTAL COSTS VAT INCL			
		 Signature of Bidder	

All pricing shall be in South African Rand (ZAR). All project milestones with costing should be listed on the pricing schedule.

7. 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.

Folder A (USB) must have documents for Stage 1 and Stage 2.

7.1. STAGE 1 [Folder A (USB)]

Bidders will be evaluated on the submission of the requested mandatory documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked. Failure will lead to disqualification and elimination from further evaluation.

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

1. Declaration of Interest – SBD 4 (New)

NB: Failure to fully complete and submit any of the above-requested mandatory documents will lead to disqualification.

7.2. STAGE 2 [Folder A (USB)]

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** out of hundred (**100**) **points** and bids that fail to achieve the minimum qualifying score will be eliminated.
- (b). Only quotes that achieved the minimum qualifying score for functionality will be evaluated further in accordance with the 80/20 (as stated in Evaluation Criteria on page 6 A and B) preference point systems prescribed in Preferential Procurement Regulations **5 and 6**.

The evaluation criteria for functionality will be as below:

NO.	CRITERIA	POINTS
1.	Contactable references and Experience: Proof of conducting similar Research project(s) and contactable references in the ETD and/or related field 1.1. Reference letters signed and in the clients' letterheads: 10 I. Five (5) or more references = 10 points II. 3 to 4 references = 5 points III. Less than 3 references = 0 points 1.2. The cumulative experience (from the above letters): 10 i. 5 years and above = 10 points ii. 3 – 4 years = 5 points iii. 0 – 2 years = 0 points *[Each reference must clearly indicate; • the name of the bidder and the project • objectives of the project (nature of the project) • duration of the project • recommendation and contact details of the referee as well as proof of completed project(s) and • must be signed. NB: If any of the above information is omitted/missing, will lead to the reference letter(s) not allocated points.	20
2.	Capacity to deliver: Profile of key staff and CV's to be attached. 2.1. Project Team Structure (20) The project team structure should comprise of but not limited to project manager, senior researcher, project admin, field workers (junior researchers), data analysts, report writer/s. ○ Project team structure with all positions above = 20 points ○ Project team structure without project manager but with all the other above-mentioned positions = 10 points NB: Project Team structure with no names and roles of personnel will not be considered. 2.2. Relevant qualification of Project Manager (10) ○ Master's degree Qualification or above = 10 points ○ Qualification below Master's degree = 0 points	50

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	2.3. Relevant qualification of senior researcher (10) ○ Master's degree Qualification or above = 10 points ○ Qualification below Master's degree = 0 points 2.4. Relevant experience of Project Manager in managing similar projects (Research within the ETD sector) (Attach CV) (10) ○ 5 years and above = 10 points ○ 3- 4 years = 5 points ○ 1 -2 years = 3 points ○ Below 1 year = 0 points NB: The initial project team need not change during the course of the project without prior approval of the ETDP SETA Research Unit.	
3.	Research Project Plan (30) A realistic and detailed project plan needs to be provided. The research project plan needs to indicate the following sections: (a) research process and methods (indicating among other sections; the research participants, key informants from various relevant organisations), (b) resource tools and allocation, (c) timelines (within the prescribed period of 12 months), (d) Plan for skills transfer to the ETDP SETA Research team, (e) data collection plan and data sources, (f) reports editing and proof-reading plan, (g) All-inclusive (VAT) detailed budget showing items. ○ Seven of the above-mentioned deliverables out of the plan = 30 points ○ Below 7 of the above-mentioned deliverables of the plan = 0 points	30
TOTAL		100

Bidders must provide documents to justify awarding the above points, and such proof should include details of contactable references to validate the information submitted.

Points will be awarded on a sliding scale only where indicated.

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

7.3. STAGE 3 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (***Price must be final, include VAT and signed***)
- b. Valid Tax Clearance Certificate or "*Unique security personal identification number (PIN) issued by SARS and must be on the SARS letter head*"
- c. Invitation to Bid - **SBD1**
- d. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 - **SBD 6.1 (If claiming preferential points)**
- e. B-BBEE certificate or sworn affidavit (***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.

8. 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 reserves the right to negotiate the bidder's price.
3. ETDP SETA reserve the right to cancel the bid and not award the bid to any of the bidders.
4. Bids which are late, incomplete, unsigned or submitted by facsimile will **NOT** be accepted.
5. 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.
6. 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.
7. 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.
8. **B-BBEE Certificates obtained from Accountants/ Auditors after 31 December 2016 will no longer be accepted.**
9. 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.
10. 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.
11. Bids submitted are to hold good for a period of 90 days.
12. 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.
13. 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.
14. Companies that are in the process of **de-registration in the CIPC** will not be considered.
15. Service Provider must provide proof of Public Liability Insurance.
16. The successful research chair **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.
17. The preference point system is applicable to price quotations with a Rand value equal to, or above **R 30 000.00** and up to a Rand value of **R 1 000 000.00 (all applicable taxes included)**.

9. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation can be downloaded from the ETDP SETA website: www.etdpseta.org.za , Main Menu > Supply Chain Management > Procurement > Request for Quotations as from 16h00 on **12 August 2022.**

All Bids/Proposals (completed in [1x Electronic copy (USB)] **ONLY** must be courier or hand delivered to:

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

OR

Sent via email to TienieJ@etdpseta.org.za or etdpsetarfq@etdpseta.org.za

NB: PAPER BASED PROPOSALS and CDs WILL NOT BE ACCEPTED AND WILL LEAD TO DISQUALIFICATION AND ELIMINATION OF YOUR BID FROM EVALUATION!

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00 on 29 August 2022.**

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 29 August 2022.**

11. 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 Management: Email: TienieJ@etdpseta.org.za or SibusisoK@etdpseta.org.za

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