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Education, Training and Development Practices Sector Education and Training Authority

BID NO: RFQ NO: 13 – 2021/22

REQUEST FOR QUOTATION

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO ASSIST WITH THE ETDP SETA WITH THE COMPLIANCE WITH THE BROAD-BASED BLACK ECONOMIC EMPOWERMENT (B-BBEE)

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 to advance skills levels in accordance with the National Development Plan. The Mandate of the ETDP SETA is to promote and facilitate the development and improvement of the skills profile of the sector's workforce in order to benefit employers and employees in the ETD sector.

2. PURPOSE & OBJECTIVES

2.1. PURPOSE OF THE PROJECT

The ETDP SETA wishes to appoint a service provider to assist the organisation to comply with Broad- Based Black Economic Empowerment (B-BBEE) requirements.

2.2. OBJECTIVES

The main objective to comply with all B-BBEE requirement and be able to report accurately.

3. PROJECT SCOPE AND REQUIREMENTS

3.1. Overview

ETDP SETA is a schedule 3A Public Entity in terms of the PFMA. ETDPSETA must perform accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), the Broad-Based Black Economic Empowerment Act (B-BBEEA), any other relevant legislation and the ETDPSETA Constitution.

3.2. Project Description

ETDP SETA seeks to appoint an experienced and qualified service provider to review the ETDPSETA readiness in compliance with Broad- Based Black Economic Empowerment (B-BBEE),

advice on remedial actions to close the identified gaps, assist with the implementation and gather all information in preparation for B-BBEE Verification process.

4. DELIVERABLES

In order to achieve the above, ETDP SETA requires services of an experienced service provider to provide the following services;

- 4.1. Undertake a comprehensive state of ETDP SETA readiness for the extent of B-BBEE compliance in its value chain,
- 4.2. Prepare and compile reports on SETA programmes and their impact on reporting on B-BBEE (Mandatory and Discretionary Grants),
- 4.3. Develop an empowerment measurement framework to benchmark, monitor, review, evaluate and report on compliance to B-BBEE Act, and B-BBEE Codes of Good Practice,
- 4.4. Service Provider will be expected to assist in improving the current ETDP SETA B-BBEE Level contribution, and
- 4.5. The Successful bidder will be expected to gather, investigate, evaluate and record ETDP SETA's B-BBEE compliance required in preparation for B-BBEE Verification and Facilitate Verification.
 - 4.5.1. Management and Control
 - 4.5.2. Skills Development (ETDP SETA internal spent of SD)
 - 4.5.3. Enterprise & Supplier Development:
 - 4.5.3.1. Preferential Procurement
 - 4.5.3.2. Allocation of Discretionary and Mandatory grants to B-BBEE Compliant employers that are levy and non-levy payers
 - 4.5.3.3. Supply Chain Management Spend
 - 4.5.3.4. Enterprise and Supplier Development (SMME and Co-op Development programs by ETDP SETA)
 - 4.5.3.5. Socio- Economic Development
- 4.6. Service provider will be expected to prepare and submit annual report as contemplated in section 13 (g) of the B-BBEE Act after B-BBEE verification results have been made available.

5. DURATION OF THE AGREEMENT

The work is expected to be completed within the period of **three (3) months**.

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:

- Once off costs
- Monthly costs
- Total Contract for a period of three months.

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.

7.1. STAGE 1

Bidders will be evaluated on the submission of the **requested mandatory documents**.

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

1. Invitation to Bid - **SBD1**
2. Declaration of Interest – **SBD 4**
3. Declaration of Bidder's Past Supply Chain Practices – **SBD 8**
4. Certificate of Independent Bid Determination – **SBD 9**

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

7.2. STAGE 2

The evaluation of this bid shall include functionality whereby the bids will be evaluated in terms of the evaluation criteria embodied in the bid documents.

- 7.2.1. The minimum qualifying score for functionality will be **70 points** and bids that fail to achieve the minimum qualifying score will be disqualified.

- 7.2.2. Only bids that achieved the minimum qualifying score 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.	Contactable references and Experience (25) 1.1. Contactable references indicating that they have been providing B-BBEE Consultancy services - (bidder to provide signed proof on referee's company letterhead) (15) ○ 3 references = 15 ○ 2 references = 10 ○ 1 reference = 5 1.2. Years of experience in doing similar jobs (a detailed company profile must be attached) (10) • 5 years and above = 10 • 4 - 3 years = 9 • 2 - 1 years = 8	25
2.	Proposed Approach: 45 2.1. Proposal detailing the work to be implemented against this ToR (25) 2.2. Quality management systems certification and policy (20)	45
3.	Project Manager Experience 3.1 Relevant experience of the Project Manager in managing similar projects (15) • 5 years and above = 15 • 3- 4 years = 10 • 1 -2 years = 5 • Below 1 = 0 3.2 Relevant experience of team members (15) • 5 years and above = 15 • 3- 4 years = 10 • 1 -2 years = 5 • Below 1 = 0	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

PRICING SCHEDULE DOCUMENTS

1. Price Proposal– **Price must be final and include VAT [(if registered for VAT) and signed.**
2. Valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS
3. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 -**SBD 6.1 (If claiming preferential points)**
4. 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 reserve the right to cancel the bid and not award the bid to any of the bidders.
3. Bids that are late, incomplete, unsigned and submitted via facsimile, 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 R10 Million and R50 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 60 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 Database.
13. Companies that are in the process of **de-registration in the CIPC** will not be considered.
14. Service Provider must provide proof of Public Liability Insurance.
15. The successful service provider **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.
16. Suppliers must note that the **80/20** preference point system is applicable to price quotations and tenders with a Rand value equal to, or above **R 30 000.00** and up to a Rand value of **R 500 000.00** (*all applicable taxes included*)

9. BID DOCUMENTS / PROPOSAL PACKS

Bid documents for participation must be downloaded from the website, www.etdpseta.org.za > Supply Chain > Procurement >> Request for Quotations as from **10 June 2021** at **12h00**.

All Bids/Proposals (completed in [1x Electronic copy (USB)] 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

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday before the closing date of 28 June 2021 at 11h00**.

Late submissions will not be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before 11h00 on **28 June 2021**.

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 HoD: 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.