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Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 29 - 2021/22

REQUEST FOR QUOTATION

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO ASSIST THE ETDP SETA WITH A CONTRACT MANAGEMENT SOLUTION

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 Skills 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 intends to appoint a competent service provider who shall establish and institutionalise a digital contract management solution (Software as a Service) that shall enable efficient drafting, approval, execution, monitoring and reporting of all contracts within the organisation.

2.2. OBJECTIVES

The main objective of the required solution is to digitise the contract management process for efficacy (efficiency and effectiveness) in terms of managing all ETDP SETA contracts.

3. PROJECT SCOPE AND REQUIREMENTS

3.1. Overview

ETDP SETA seeks to appoint an experienced and qualified service provider to digitize contract management of all contracts within the organization. These include Service Level Agreements (SLAs), Memoranda of Agreement (MoA) and any other contracts related to projects funded by the ETDP SETA and implemented by its Constituencies.

4. DELIVERABLES

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

4.1. Develop a digital contract management solution that will cater for all projects

4.2. The solution must have the following functionalities:

- 4.2.1. Contract initiation
- 4.2.2. Automatically generates contracts
- 4.2.3. Define contract users and their associated permissions
- 4.2.4. Built-in contract approval process
- 4.2.5. Collaboration amongst various contract users
- 4.2.6. Central management of all organisational contracts
- 4.2.7. Configure contract timelines
- 4.2.8. Ability to renew and terminate contracts
- 4.2.9. Capture and monitor contract value and expenditure
- 4.2.10. Reminders and/or alerts on critical contract deadlines
- 4.2.11. Alert key stakeholders when changes are made to a contract
- 4.2.12. Weekly, monthly, quarterly, and annual consolidated reports on performance and financial information to be pulled for all contracts where necessary
- 4.2.13. Notification for contract renewal if deliverables are likely not to be met before expiry date
- 4.2.14. Contract management Dashboard to view and analyse contract information (status changes, approvals, deadline, value, expenditure etc)
- 4.2.15. Integrate into existing third-party applications
- 4.2.16. Import and use data from third party applications

4.3. The service provider shall be expected to support the ETDP SETA to pull reports as outlined in 4.2 12 above on a weekly, monthly, quarterly and annual basis.

4.4. The service provider shall be expected to train all users of the system on inception and provide support through-out the contract period.

4.5. service provider/s may be requested to perform a demo prior to appointment/s

5. DURATION OF THE AGREEMENT

The duration of the agreement is **two (2) years** after the signing of the Service Level Agreement (SLA).

- Once off costs
- Monthly costs
- Total Contract for a period of two years.

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

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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**.

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

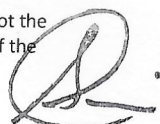
1. Invitation to Bid - **SBD1**
2. Declaration of Interest – **SBD 4**
3. Declaration of Bidder's Past Supply Chain Practices – **SBD 8**
4. Certificate of Independent Bid Determination – **SBD 9**
5. Proof of product ownership or authorised reseller

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

7.2. STAGE 2 [Folder A (USB)]

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 Contract Management Solution - (bidder to provide signed proof on referee's company letterhead) (15) a) 3 references = 15 b) 2 references = 10 c) 1 reference = 5 1.2. Years of experience in doing similar jobs (a detailed company profile must be attached) (10) a) 5 years and above = 10 b) 3 -4 years = 9 c) 1 -2 years = 8	25
2.	Proposed Solution roll-out Approach: 45 2.1. Proposal detailing the work to be implemented against this ToR a) Meeting all deliverables from 4.2.1 to 4.2.16 = 100% (45) b) Meeting most of the deliverables from 4.2.1 to 4.2.16 = 60% (27) c) Meeting some of the deliverables from 4.2.1 to 4.2.16 = 40% (18) d) Meeting none of the deliverables from 4.2.1 to 4.2.16 = 0% (0)	45
3.	Project Manager Experience 3.1 Relevant experience of the Project Manager in managing similar contract management solutions (15) a) 5 years and above = 15 b) 3- 4 years = 10 c) 1 -2 years = 5 d) Below 1 = 0 3.2 Relevant experience of the technical lead person (Attach CV - the CV must clearly indicate the projects, date/period of implementation, names of clients and client contact details (15) a) 5 years and above = 15 b) 3- 4 years = 10 c) 1 -2 years = 5 d) Below 1 = 0	30
TOTAL		100

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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 (Folder B)

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.

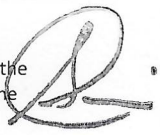
NB: PLEASE NOTE THAT INCLUSION OF THE FINANCIAL PROPOSAL IN FOLDER A WILL LEAD TO DISQUALIFICATION.

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 which are late, incomplete, unsigned will not be accepted.
4. As a result of the COVID-19, bids submitted through email and in order will 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. The successful service provider **must** sign the penalty and termination clause as part of the agreement with ETDP SETA.
16. The 80/20 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)**.

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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 **13 September 2021.**

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 **23 September 2021.**

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before 11h00 on **23 September 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.

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