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Education, Training and Development Practices Sector Education and Training Authority

**RFQ NO: 56 - 2024/25**

## **REQUEST FOR QUOTATIONS**

### **TERMS OF REFERENCE FOR THE APPOINTMENT OF THE SERVICE PROVIDER TO RENDER OCCUPATIONAL HEALTH AND SAFETY (OHS) COMPLIANCE SERVICES FOR THE NINE (9) ETDP SETA PROVINCIAL OFFICES AND AT THE HEAD OFFICE.**

#### **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 to benefit employers, workers, and employees in the ETD sector.

#### **2. PURPOSE AND OBJECTIVES**

##### **2.1. PURPOSE**

The purpose of this Request for Quotation (RFQ) is to appoint a qualified, suitable and registered service provider to render Occupational Health and Safety (OHS) services in terms of the Occupational health and Safety Act 85 of 1993, for the nine (9) ETDP SETA Provincial Offices and at the Head Office.

#### **3. PROJECT SCOPE AND REQUIREMENTS**

##### **3.1. PROJECT SCOPE**

- 3.1.1. Advise the ETDP SETA on occupational health and safety matters.
- 3.1.2. Advice on all forms of health and safety risk assessments.
- 3.1.3. Advise on compliance with Occupational Health and Safety regulations.
- 3.1.4. Conduct Occupational Health and Safety related surveys.
- 3.1.5. Produce and coordinate *Safety, Health, Environment and Quality (SHEQ)* action plans.

The information in this communication is confidential and may be legally privileged.

It is intended for the sole use of the individual/s or entity to whom this has been addressed or copied. If you are not the intended recipient you are hereby notified that any disclosure, copying, distribution or taking action in reliance of the contents of this communication and/or its attachments, is strictly prohibited and will be unlawful.

- 3.1.6. Advise the ETDP SETA on compliance matters and provide reports to management and various committees and governance structures within the organization, where necessary or as and when required.
- 3.1.7. Advise the ETDP SETA on all health, safety, quality, and environmental matters and ensure that such advice is incorporated into day-to-day processes and operations.
- 3.1.8. Provide support and expertise to the ETDP SETA on incident investigations and reporting (including dangerous occurrences and occupational diseases).
- 3.1.9. Review and advise on existing SHEQ policies to maximize compliance with all Health and Safety regulations.
- 3.1.10. Assist in the development of *Safety, Health, Environment and Quality* (SHEQ) action plans and related policies and procedures.

### **3.2. PROFILE OF SERVICE PROVIDER**

- 3.2.1. The service provider must have the necessary qualifications, experience and expertise in Occupational Health and Safety in the Republic of South-Africa.
- 3.2.2. The service provider must have experience and expertise in conducting risk assessments in a working environment.
- 3.2.3. The service provider must have experience and expertise in developing occupational health and safety policies and procedures.

### **3.3. PROJECT REQUIREMENTS**

- 3.3.1. The service provider must provide evidence of a track record of a similar assignment undertaken.
- 3.3.2. The service provider must provide services in line with the Occupational Health and Safety Act, No. 85 of 1993.
- 3.3.3. The service provider must provide names and contact details of three referees who can provide an objective assessment of the project previously undertaken.
- 3.3.4. The bidder must demonstrate experience of matters relating to health and safety in a working environment by providing proof of evidence thereof.
- 3.3.5. The service provider must have at least a minimum of three (3) years' experience in Occupational Health and Safety consulting and at least 5 years in a SHEQ Management Role.
- 3.3.6. Project Manager must have at least three years of experience in conducting/managing similar projects, (to provide a C.V and certified copies of relevant academic qualification(s)).

- 3.3.7. The service provider must have at least three years of experience in conducting Compliance Audits, Risk Assessment experience, an in-depth understanding of and the ability to interpret SHEQ-related legislation and the understanding of Occupational Health and Safety standards.

#### **4. SCOPE OF WORK**

To provide health and safety services for the nine (9) ETDP SETA Provincial Offices and at the Head Office.

## 5. COSTING MODEL (PRICE SCHEDULE)

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

| DESCRIPTION OF SERVICES REQUIRED: OHS SURVEYS AND REPORTING                                                              |                                                                                                                                                                       |            |
|--------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| No                                                                                                                       | DELIVERABLES                                                                                                                                                          | COST ("R") |
| 1.                                                                                                                       | Conduct organizational risk assessments and surveys                                                                                                                   |            |
| 2.                                                                                                                       | Produce and coordinate Safety, Health, Environment and Quality (SHEQ) action plans and long term SHEQ roadmap.                                                        |            |
| 3.                                                                                                                       | Advise the ETDP SETA on all health, safety, quality and environmental matters and to ensure that all advice are incorporated into day-to-day processes and operations |            |
| 4.                                                                                                                       | Provide support and expertise to the ETDP SETA on incident investigations and reporting (including dangerous occurrences and occupational diseases).                  |            |
| 5.                                                                                                                       | Review and advice on existing policies to maximise compliance with all Health and Safety regulations                                                                  |            |
| 6.                                                                                                                       | Developing SHEQ policies and procedures                                                                                                                               |            |
| VALUE ADDED TAX @ 15% (IF APPLICABLE)                                                                                    |                                                                                                                                                                       |            |
| TOTAL COST (VAT INCLUSIVE)                                                                                               |                                                                                                                                                                       |            |
| <b><i>All travel and accommodation costs will be managed by ETDP SETA and should not form part of the quotation.</i></b> |                                                                                                                                                                       |            |

NAME OF BIDDER: \_\_\_\_\_

POSITION/ ROLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

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

## 6. DURATION OF THE PROJECT

The service duration is for the period of **thirty-six (36) months**. The contract will become effective on the date of last signature.

## 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, 2022. 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.*

|                                                                                          |
|------------------------------------------------------------------------------------------|
| <b>7.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION</b> |
|------------------------------------------------------------------------------------------|

1. Valid proof of registration with the South African Institute of Occupational Safety and Health (SAIOSH).

***NB: Failure to submit any of the above-requested mandatory document 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.

1. The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | POINTS |
|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| 1.  | <p><b>Experience &amp; References of service providers in doing business of similar nature in an organization.</b></p> <p><b>1.1. Experience:</b> In conducting similar projects (to be submitted on a signed referee's company letterhead indicating when the project was carried out) <b>(25)</b></p> <ul style="list-style-type: none"> <li>i. Must have successfully completed 3 or more similar projects = <b>25</b></li> <li>ii. Must have successfully completed between 2 - 3 similar projects = <b>15</b></li> <li>iii. Must have successfully completed between 1 - 2 similar projects = <b>5</b></li> </ul> <p><b>1.2 Contactable references (on the referee's company letterhead) (25)</b></p> <ul style="list-style-type: none"> <li>iv. Three (3) or more reference letters submitted = <b>25</b></li> <li>v. Two (2) reference letters submitted = <b>15</b></li> <li>vi. One (1) reference letter submitted = <b>5</b></li> </ul> <p><b>*[Each reference must clearly indicate;</b></p> <ul style="list-style-type: none"> <li>• <i>the name of the bidder and the project</i></li> <li>• <i>objectives of the project (nature of the project)</i></li> <li>• <i>duration of the project</i></li> <li>• <i>recommendation and contact details of the referee as well as proof of completed project(s) and</i></li> <li>• <i>must be signed the referee.</i></li> </ul> <p><b>NB: If any of the above information is omitted, the bidder will not be allocated points.</b></p> | 50     |
| 2.  | <p><b>Proof of capacity to conduct similar or related Occupational Health and Safety Compliance Officer services: Qualifications and work experience</b></p> <p><b>2.1. Relevant qualifications of the Project Manager</b> (provide a C.V with a minimum of three contactable references and certified copies of relevant academic qualification(s): <b>(10)</b></p> <ul style="list-style-type: none"> <li>i. Master's degree in safety management or relevant qualification = <b>10</b></li> <li>ii. Batchelor's Degree in Safety Management or relevant qualification = <b>8</b></li> <li>iii. National Diploma in Safety Management or relevant qualification = <b>5</b></li> </ul> <p><b>2.2. Experience of Project Manager: (10)</b></p> <ul style="list-style-type: none"> <li>i. <b>Five (5) or more years = 10</b></li> <li>ii. <b>3 – 4 years = 8</b></li> <li>iii. <b>1 – 2 years = 5</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 50     |

|              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |            |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
|              | <p><b>2.3. Relevant qualification of the technical person/s in managing Occupational Health and Safety (Attach CV): (10)</b></p> <ul style="list-style-type: none"> <li>i. Batchelor's Degree in Safety Management or relevant qualification = <b>10</b></li> <li>ii. National Diploma in Safety Management or relevant qualification = <b>8</b></li> <li>iii. National Higher Certificate in Safety Management or relevant qualification = <b>5</b></li> </ul> <p><b>2.4. Relevant experience of the technical person/s (Attach CV - the CV must clearly indicate the projects, date/period of implementation, names of clients and client contact details (20)</b></p> <ul style="list-style-type: none"> <li>▪ Above 10 years = <b>20</b></li> <li>▪ 5 years and 9 years= <b>10</b></li> <li>▪ 3 – 4 years = <b>8</b></li> <li>▪ 1 – 2 years = <b>5</b></li> </ul> <p><b>NB: Experience of the project manager must be relevant to the project. Registration with relevant OHS professional bodies will be an added advantage.</b></p> |            |
| <b>Total</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>100</b> |

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

### 7.3. STAGE 3 [Folder B (USB)]

#### PRICING SCHEDULE DOCUMENTS

- a. Costing Model (*Price must be final, include VAT and signed*)
- b. Submit a "Unique security personal identification number (PIN) issued by SARS" **which the SETA will use to verify the bidder's tax matters prior to the award**
- c. Invitation to Bid - **SBD1**
- d. Declaration of Interest – **SBD 4 (New)**
- e. Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 - **SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals**
- f. B-BBEE certificate or sworn affidavit (*If claiming preferential points*) – **this will be used to verify points to be allocated for specific goals.**

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

- |                                |           |
|--------------------------------|-----------|
| ✓ Price                        | <b>80</b> |
| ✓ Allocation of specific goals | <b>20</b> |

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 **will NOT** be accepted.
5. Bidders must submit a valid certified B-BBEE Certificate from SANAS Accredited Verification Agency or issued by Companies and Intellectual Property Commission (**CIPC**) or a signed Sworn Affidavit for allocation of points for specific goals.
6. Specific goals shall not be allocated where supportive documents as stated in the bid documents are not provided as stated in the bid document.
7. Bids submitted are to hold good for a period of **90 days**.
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** provide 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 points for specific goals for B-BBEE status level of contribution are not claimed.
10. 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.
11. All suppliers must be registered on the Central Supplier Database. No bid shall be awarded to any supplier that is not registered on the Central Supplier Database.
12. Companies that are in the process of de-registration in the CIPC will not be considered.
13. The ETDP SETA remains the sole owner and custodian of all content, material, or any other form of development. No information of or on behalf of the ETDP SETA may be shared, during the duration or after the closing period of the project. It remains the responsibility of the appointed service provider to hand over all material to the ETDP SETA. Should a service provider wish to have the ETDP SETA as a referral, permission for this must be sought.

## 9. BID DOCUMENTS/PROPOSAL PACKS

Bid documents for participation **must** be downloaded from the ETDP SETA website: [www.etdpseta.org.za](http://www.etdpseta.org.za), Main Menu > Supply Chain Management > Open RFQs and on National Treasury E-portal as from **12h00** on **19 September 2024**.

Bidders must submit technical and financial proposals in **one (1) USB** clearly marked **"Folder A-Technical Proposal" and "Folder B- Financial Proposal"**.

**Folder B - (Financial Proposal)** Costing Model (*Price must be final, include VAT and signed*), Submit a *"Unique security personal identification number (PIN) issued by SARS" which the SETA will use to verify the bidder's tax matters prior to the award*, Invitation to Bid - **SBD1**, Declaration of Interest – **SBD 4 (New)**, Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2022 -**SBD 6.1 (If claiming preferential points) - this will be used to verify points to be allocated for specific goals** and B-BBEE certificate or sworn affidavit (*If claiming preferential points*) – *this will be used to verify points to be allocated for specific goals*.

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

The ETDP SETA – Head Office  
HOSKEN'S House  
45 Mooi Street  
Johannesburg South - CBD  
2091

OR

Sent via email to: [etdpsetarfq@etdpseta.org.za](mailto:etdpsetarfq@etdpseta.org.za)

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00** on **04 October 2024**.

**No late submission will be accepted!**

## 10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00** on **04 October 2024**.

## 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: [etdpsetarfq@etdpseta.org.za](mailto:etdpsetarfq@etdpseta.org.za)

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

#### ANNEXURE A

Bidders are required to provide references for the Project Manager and Technical Person. Failure to provide references will lead to points not being allocated:

##### 1. RELEVANT EXPERIENCE FOR THE PROJECT MANAGER

Name of the Project Manager: \_\_\_\_\_

| Project/Company name | Position/Role | Responsibilities | Start date | End date | Reference (Name & Surname) | Reference (Position) | Reference (Contact details) |
|----------------------|---------------|------------------|------------|----------|----------------------------|----------------------|-----------------------------|
|                      |               |                  |            |          |                            |                      |                             |
|                      |               |                  |            |          |                            |                      |                             |
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|                      |               |                  |            |          |                            |                      |                             |
|                      |               |                  |            |          |                            |                      |                             |

##### 2. RELEVANT EXPERIENCE FOR THE TECHNICAL PERSON

Name of the Technical Person: \_\_\_\_\_

| Project/Company name | Position/Role | Responsibilities | Start date | End date | Reference (Name & Surname) | Reference (Position) | Reference (Contact details) |
|----------------------|---------------|------------------|------------|----------|----------------------------|----------------------|-----------------------------|
|                      |               |                  |            |          |                            |                      |                             |
|                      |               |                  |            |          |                            |                      |                             |
|                      |               |                  |            |          |                            |                      |                             |
|                      |               |                  |            |          |                            |                      |                             |
|                      |               |                  |            |          |                            |                      |                             |