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Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 60 – 2023/24

REQUEST FOR QUOTATIONS

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE MONITORING AND EVALUATION TRAINING FOR (16) ETDP SETA EMPLOYEES

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 (**NSDP**). 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 ETDP sector.

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

2. PURPOSE AND OBJECTIVES

2.1. Overview and Background

The training's purpose is to ensure that ETDP SETA provides training for **sixteen (16) ETDP SETA employees** to provide them with the skills and knowledge to effectively monitor and evaluate programs and projects.

SAQA ID NUMBER	SKILLS PROGRAMME NAME	NQF LEVEL	MIN CREDIT	Min Duration
252024	Monitoring and Evaluation	5	4	3-5 days

3. PROFILE OF THE SERVICE PROVIDER AND REQUIREMENTS

3.1. TRACK RECORD OF TRAINING IN THE MONITORING AND EVALUATION

The Training Provider must have training experience on the topic of Monitoring and Evaluation.

3.2. Your proposal should contain the following:

- 3.2.1. List of organisations where training on Monitoring and Evaluation had been conducted in the past three (3) years,
- 3.2.2. Three (3) Reference Letters from the organisation's client where you have conducted Monitoring and Evaluation training,
- 3.2.3. Outline of the roles and responsibilities of the Assessor, Moderator and Facilitator, and

- 3.2.4. A short description of your understanding of the role of the Training Provider and the approach to be used as outlined in these Terms of Reference.

3.3. Requirements

- 3.3.1. At least five years of experience and expertise in training on the topics of Monitoring and Evaluation as an Assessor, Moderator and Facilitator.
- 3.3.2. Strong interpersonal skills; results-oriented and focused; ability to interact with attendees.
- 3.3.3. Ability to communicate well in written and oral form in English.

4. SCOPE OF WORK AND DELIVERABLES

- 4.1. The service provider will provide training to the ETDP SETA employees in the following area:

- Monitoring and Evaluation training.

4.2. Training/projects requirements:

- 4.2.1 Qualified Training Assessor, Moderator and Facilitator
- 4.2.2 The training duration must be a minimum of three (3) days and a maximum of five (5) days.
- 4.2.3 Resource packs in both hard and soft copy to be provided to the sixteen (16) attendees on the day of training.
- 4.2.4 The service provider must issue a monitoring and evaluation certificate to the ETDP SETA officials who attended the training no later than 30 days after the completion of the training session.

4.3. The training must include but not be limited to the following contents:

- 4.3.1 Introduction to results-based project management.
- 4.3.2 Fundamentals of monitoring and evaluation.
- 4.3.3 Project Analysis.
- 4.3.4 Design of results in monitoring and evaluation
- 4.3.5 M&E Indicators.
- 4.3.6 Logical Framework Approach.
- 4.3.7 Theory of Change.
- 4.3.8 M&E Systems
- 4.3.9 M&E Planning
- 4.3.10 Base survey in results-based M&E
- 4.3.11 Project Performance Evaluation
- 4.3.12 M&E data management
- 4.3.13 M&E results use and dissemination.
- 4.3.14 Qualitative data analysis
- 4.3.15 Impact assessment

4.4. Objective:

- The objective of this programme is to empower employees to develop a comprehensive monitoring and evaluation plan, in the principles and practical application of Monitoring and

Evaluation and provide employees with skills to effectively employ the correct tools in tracking the performance of programmes and projects.

4.5 Outcomes: Upon completion of this course, the participants should be able to:

- 4.51 Monitoring and Evaluation (M&E concept)
- 4.5.2 Role of M&E
- 4.5.3 Application of M&E
- 4.5.4 M&E as a national priority
- 4.5.5 Key institutions implementing the system.
- 4.5.6 Evaluation of M&E system
- 4.5.7 Contextualising different approaches to and theories of monitoring and evaluation in a particular organisation.
- 4.5.8 Demonstrating an informed understanding of appropriate research design and methodology for monitoring and evaluating an organisation or programme in a specific context.
- 4.5.9 Designing a monitoring and evaluation plan for a specific context.
- 4.5.10 Collecting appropriate data aligned to specific indicators in a monitoring and evaluation plan.
- 4.5.11 Analysing and interpreting collated data.
- 4.5.12 Project analysis
- 4.5.13 Project performance evaluation

4.6 Deliverables:

- 4.6.1. NQF Level 5 Monitoring and Evaluation Competence Certificate.

5. COSTING MODEL (PRICE SCHEDULE)

COST COMPARISON FOR THE EVALUATION OF THE ETDP SETA TRAINING OF (16) ETDP SETA EMPLOYEES

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	Hourly Rate Inc VAT	Total Fee per Day Inc VAT	Total Cost (Inc VAT)
Facilitation of the course, for 3-5 days			
Assessor, Moderator, and Facilitator			
Admin Costs: Provider Material: Manual soft copy and hard copy. Provider to use their own learning material that is interactive.			
NQF Level 5 Monitoring and Evaluation Competence Certificate.			
SUB-TOTAL			
VAT @ 15% (If applicable)			
TOTAL COSTS VAT INCL			

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 total duration of the training must be a minimum of **three (3) days** and a maximum of **five (5) days**.

The dates/days to conduct the training will be agreed upon once an appointment has been successfully made.

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' signatures must be submitted and all applicable boxes be ticked.

7.1.1. MANDATORY DOCUMENTS TO BE SUBMITTED IN ORDER TO BE ELIGIBLE FOR EVALUATION
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1. Programme Accredited Letter with SAQA ID 252024 approval

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.

- 7.2.1.1. The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be disqualified.
- 7.2.1.2. Only bids 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 preference point systems prescribed in Preferential Procurement Regulations **5 and 6**).

The evaluation criteria for functionality will be as below:

NO	CRITERIA	POINTS
1.	Relevant, demonstrated experience and capacity of the firm; bidders should provide a minimum of three (3) references. (Reference letters in relation to training facilitation experience in Monitoring and Evaluation training) The reference letter must be on the customer's letterhead with contactable references. 1.1. Reference letters signed on the clients' letterheads: 15 - Three (3) or more references = 15 points 1 to 2 references = 10 points - Less than 1 reference = 0 points 1.2. Business Experience: The cumulative experience of the company in conducting Monitoring and Evaluation training (from the above letters). Letters of Reference detailing experience and the ability to deliver on time on the referee's company letterhead. 3 years or more = 20 points 1 to 2 years = 15 points - Less than 1 = 5 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. NB: Reference letters must be on a referee's letterhead, signed and dated, otherwise they cannot be considered.	35
2.	Team composition and experience; demonstrated expertise of key individuals to be involved in this project (Attached relevant registration certificate, CV and Qualification were applicable) 2.1 Full details of registered Assessor (Assessor registration letter with relevant SETA) = 15 - Assessor Registration letter = 15 - No Assessor Registration Letter = 0 2.2 Full details of registered Moderator (Moderator registration letter with relevant SETA) = 15 - Moderator Registration letter = 10 - No Moderation Registration Letter = 0 2.3 Full details of Facilitator (attach CV with relevant experience facilitating the learning programme and relevant qualification) = 10 - years plus = 10 3 - 4 years = 5 - Below = 0	35

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.	Project plan for the delivery of the full qualification as a training programme, as listed in Section 4.3; - Project plan to cover all the fifteen (15) areas, as listed over 2-3 days = 30 - Project plan not covering all the fifteen (15) areas = 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 [Folder B (USB)]

PRICING SCHEDULE DOCUMENTS

- 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**
- 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	80
✓	Allocation of specific goals	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 **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.
9. 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.
10. 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.
11. Companies that are in the process of de-registration in the CIPC will not be considered.
12. 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, Main Menu > Supply Chain Management > Open RFQs as from **16h00** on **10 November 2023**.

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
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 and time of **11h00** on **27 November 2023**.

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00** on **27 November 2023**.

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.

ANNEXURE A

Bidders are required to provide references for Assessor, Moderator and Facilitator. Failure to provide references will lead to disqualification:

1. RELEVANT EXPERIENCE FOR ASSESSOR

Name of Assessor: _____

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

2. RELEVANT EXPERIENCE OF MODERATOR

Name of Moderator: _____

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

3. RELEVANT EXPERIENCE OF FACILITATOR

Name of Facilitator: _____

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