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Education, Training and Development Practices Sector Education and Training Authority

SCMU NO: 03 - 2022/23

REQUEST FOR BIDS

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO ASSIST THE ETDP SETA WITH AN EXPERT ADVICE ON ACQUIRING SUITABLE OFFICE SPACE AS WELL AS SPACE PLANNING NORMS AND STANDARDS

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 in order to benefit employers and employees in the ETD sector.

The ETDP SETA will host a **COMPULSORY** virtual briefing session for **BID NO: SCMU: 03 - 2022/23 – Expert advice on acquiring suitable office space as well as space planning norms and standards on 21 July 2022 at 11h00**. Interested members must please communicate their interest to join in the session, before **19 July 2022**. To attend and get access to the session, please email: **TienieJ@etdpseta.org.za** with your Name, Surname, Company Name, Email address and Cellphone Number. Access details will only be shared with those that confirmed. Please do not forward the link further. We thank you for your cooperation.

NB: THE MEETING ROOM FOR THE COMPULSORY BRIEFING SESSION WILL CLOSE AT 11H15

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

2. PURPOSE & OBJECTIVES

2.1. PURPOSE OF THE PROJECT

ETDP SETA seeks to appoint an experienced Property Consultant to provide advisory services to its management team on property market analysis, the law pertaining to leases, sectional titles/full titles and other related property matters in order to advise on a long-term solution of securing office space for its Head Office, *see attached physical address*.

2.2. OBJECTIVES

The main objective of the Property Consultant will be to:

- 2.1.1. Provide counsel to the ETDP SETA on commercial property market conditions, trends, prices fluctuations, purchases and leases.
- 2.1.2. Provide counsel on the commercial property trends since the outbreak of the pandemic COVID-19 based on ETDP SETA's staff compliment.
- 2.1.3. Provide counsel on the legal/commercial nuances pertaining to leases, sectional titles/full titles and applicable property laws in general.
- 2.1.4. Advise ETDP SETA on best possible options to secure premises for its employees by proposing informed long-term and cost-effective solutions.
- 2.1.5. Advise the ETDP SETA on whether to rent or to buy property and the costs associated with each option as well as advantages and or / disadvantages.
- 2.1.6. The Property Consultant must have the relevant knowledge, understanding and experience in National Treasury Framework for infrastructure delivery, procurement management, national building regulations & standards, municipal by laws, CIDB and the advice should therefore be cognizant of these prescripts.

3. PROJECT SCOPE AND REQUIREMENTS

The appointed property consultant is expected to provide a detailed project plan and progress reports on the status of the project.

3.1. Project Plan

The appointed service provider will be expected to complete the project and hand-over a detailed close off report on the agreed date with ETDP SETA management. The following minimum project management deliverables are required as part of the supporting documents for the bid on how the project will unfold for the duration of the contract:

- 3.1.1. Activities and tasks;
- 3.1.2. Timeframes;
- 3.1.3. Deliverables;
- 3.1.4. Project Initiation Document;
- 3.1.5. Project Kick-off Meeting;
- 3.1.6. Project Reports;
- 3.1.7. Risk & Issue Register;
- 3.1.8. Project Close-out Report

3.2. Progress Reporting

The service provider will be required to attend regular onsite meetings, as agreed with ETDP SETA to discuss general progress, quality of work, problems, claims, payments, etc. and any other matters concerning the day-to-day running of the contract.

4. SCOPE OF WORK

In order to achieve the above, ETDP SETA requires services of an experienced Property Consultant to provide the following services but not limited to:

- 4.1. Market analysis of the rentals per square meter and building prices. This should reflect the past two years, current year and the next three-year outlook.
- 4.2. Forecasts of rental levels using econometric modelling.
- 4.3. Long-term forecasts of property values in South Africa.
- 4.4. The market study to also indicate trends on commercial property. The likely future of commercial property in SA. Is it better to buy, own or lease.
- 4.5. What are the new trends of office space occupancy in the Covid times including the effects the pandemic has caused on the property market?
- 4.6. The office requirements for space allocation, fit-outs and alterations;
- 4.7. Develop and effective hybrid model for the organization.
- 4.8. Develop and manage stakeholder survey based on the industry trends.
- 4.9. The property consultant must also advise the ETDP SETA on the challenges faced by central business districts in most cities and towns in South Africa.
- 4.10. Advisory services to implement the Government Immovable Asset Management Act, Act 19 of 2007 (GIAMA).
- 4.11. Research to determine the highest and best use for unused and underutilized government immovable assets.
- 4.12. To advise the ETDP SETA in deciding on whether to rent or buy property based on the current economic conditions.
- 4.13. The suitable size of the building for its staff per each office's needs, taking into account the number of the employees, as well as the core business of the ETDP SETA.
- 4.14. To assist the ETDP SETA to draft Terms of Reference (TORs) and to be involve in bidding structure process until awarding of the contract.
- 4.15. The impact of having retail tenants on the office building.
- 4.16. Provide assistance to determine the appropriate building classification/grading in accordance to the South African Property Association (SAPOA).
- 4.17. To provide information on the green buildings that are energy efficiency (generators versus solar panels & lighting sensors).
- 4.18. Provide information on the tenant installation allowance in commercial property industry (office rentals) and how is applies including the calculation methods used to determined cost.
- 4.19. Layout in terms of office space allocation and ergonomics with reference to organizational structure (number of employees).
- 4.20. The service provider needs to determine the highest and best use for unused and underutilized government immovable assets.
- 4.21. The service provider shall measure the building space as defined by the South African Property Owners Association Method for measuring floor areas in commercial and industrial buildings
- 4.22. The Property Consultant should provide a report which also includes forecasting, overviews, and expect analysis for corporate, government departments and SOE's.
- 4.23. The service provider to do stake holder surveys, public accessibility to the organizational premises, working models and safety of the building location.

5. DURATION OF THE AGREEMENT

The duration of the agreement is **twelve (12) 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 costs:

- Total Contract amount for **twelve (12) months**.

No.	Description	Costing (Excl. VAT)
1.	Advise on office rental and / or buying	
2.	Development and management of stakeholder survey	
3.	Office space planning	
4.	Development of a hybrid model	
5.	Stakeholder surveys	
6.	Participation in the bid structures	
7.	Other costs under <i>deliverables as reflected on paragraph 4</i>	
Total Cost (Excl. VAT)		
VAT		
Total Cost (Incl. VAT)		
		 Signature of Bidder

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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 Stages 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 STAGE 1

1. Declaration of Interest – **SBD 4 (New)**
2. Valid registration **with three** of the following property professional bodies:
 - Estate Agency Affairs Board (EAAB);
 - Institute of Estate Agents of South Africa (IEASA);
 - South African Property Owners Association (SAPOA)

The following bodies will serve as an addition

- South African Institute of Valuers (SAIV)
- South African Council for the Property Valuers Profession (SACPVP)
- Institute of Property Practitioners of South Africa (IPPSA)

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)]

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.	Business Experience and References: The Service Provider must provide proof of appropriate experience on reference letters where similar work was rendered. (30) 1.1. Contactable references provide signed proof on referee's company letterhead (15) 1.1.1. 3 references = 15 1.1.2. 2 references = 10 1.1.3. 1 reference = 5 1.2. Years of experience (to be derived from reference letters) (15) 1.2.1. 5 years and above = 15 1.2.2. 3 -4 years = 10 *[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 projects completed on time and • must be signed. NB: If any of the above information is omitted/missing will lead to the reference letter(s) not allocated points.	30
2.	Project Plan (40) A realistic and detailed project plan needs to be provided. The 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) data collection plan and data sources, (f) reports editing and proof-reading plan, (g) All-inclusive (VAT) detailed budget showing items.	40

	* Meet all of the above-mentioned deliverables out of the plan = 40 points * Does not meet all of the above-mentioned deliverables of the plan = 0 points	
3.	Property Consultant's Qualifications and experience (30) 3.1. Relevant qualifications of the Property Consultant appointed to assist/advise the ETDP SETA on property matters. The Service Provider must provide a detailed CV and copies of qualifications of the Property Consultant. (15) - BSc in Real Estate NQF 7 =6 B. Com Law or Contract Law NQF 7 =3 - Certificate in in Real Estate NQF 4 =2 - Certificate in Facilities Management NQF 4 =2 - Certificate in Project Management NQF 4 =2 3.2. Relevant experience of Project Consultant. (15) 5 years and above =15 3-4 years=7 1-2 years=3 NB: The initial property consultant need not change during the course of the project without prior approval of the ETDP SETA	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**)
- Valid Tax Clearance Certificate or "Unique security personal identification number (PIN) issued by SARS and must be on the SARS letter head"
- Invitation to Bid - **SBD1**
- Preferential Points Claim Form in terms of the Preferential Procurement Regulations, 2017 - **SBD 6.1 (If claiming preferential points)**
- B-BBEE certificate or sworn affidavit (**If claiming preferential points**)

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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 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 and/or email 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.

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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 Tenders as from **12h00** on **08 July 2022**.

Bidders must submit technical and financial proposals in **two separate USBs ONLY** clearly marked “Folder A-Technical Proposal” and “Folder B- Financial Proposal”.

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

Folder B must include the **complete and signed costing model and Valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS and must be in SARS letterhead” (Mandatory).**

The financial proposal will only be opened when the tender is responsive in Stage 2 or at the discretion of the ETDP SETA.

All Bids/Proposals on USB must be hand/ courier delivered to:

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

Submissions can be delivered into the tender box between **08h00 and 16h30 Monday to Friday BEFORE** the closing date and time of **11h00 on 02 August 2022**.

No late submission will be accepted!

10. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00 on 02 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 Manager: Email: tenderers@etdpseta.org.za

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