



 7 Wessels Road | Rivonia | 2128

 28 March 2024

## TERMS OF REFERENCE – REQUEST FOR QUOTATIONS

### THE APPOINTMENT OF A SUITABLY QUALIFIED SERVICE PROVIDER TO FACILITATE FOODBEV SETA MANAGEMENT AND BOARD STRATEGIC PLANNING SESSIONS.

Food & Beverages Manufacturing Sector Education and Training Authority's (FoodBev SETA) hereby invites all suitably qualified bidders to submit quotations to facilitate strategic planning sessions:

<b>Closing date of submission</b>	09 April 2024
<b>Closing time of submission</b>	16h00
<b>Quotes to be e-mailed to</b>	<a href="mailto:scm@foodbev.co.za">scm@foodbev.co.za</a>
<b>All quotes must be valid for at least</b>	90 days
<b>Delivery address for the goods</b>	7 Wessel Rd, Rivonia, Johannesburg.

All queries/ clarifications can be sent in writing, citing the bid reference above to the under-mentioned person before the closing date for the quote:

<b>Queries address to</b>	Nokuthula Sibia
<b>Telephone Number: Landline</b>	011 253 7340
<b>e-mail address to send queries</b>	<a href="mailto:thulis@foodbev.co.za">thulis@foodbev.co.za</a>

## 1. BACKGROUND

FoodBev SETA is a PFMA Schedule 3A Public Entity established in terms of the Skills Development Act 97 of 1998. FoodBev SETA is currently operating in Johannesburg at number 7 Wessel Rd, Rivonia, Sandton, 2128. FoodBev SETA's function is to promote, facilitate and incentivize skills development in the food and beverages manufacturing sector.

FoodBev SETA is one of 21 Sector Education and Training Authorities (SETAs) across the economy mandated to facilitate the delivery of skills development in the country in line with National Skills Development Plan (NSDP) outcomes.



## 2. PURPOSE

FoodBev SETA is seeking the services of a qualified, competent and experienced service provider to facilitate a series of strategic planning sessions for FoodBev SETA Management and Board. The outcomes of these sessions will inform the development of the new five-year Strategic Plan (2025-2030) and Annual Performance Plan for the FoodBev SETA.

### Objectives

The primary objective of this engagement is to facilitate productive strategic planning sessions that will enable the management and board to:

- Review and analyse current organisational performance, challenges and opportunities.
- Review vision and mission statement for the SETA.
- Define strategic outcomes, objectives, and key performance indicators (KPIs) for the next five years.
- Identify priority areas and strategic initiatives to achieve the set goals.
- Allocate resources effectively and prioritise actions for implementation.
- Ensure alignment with national policies, industry trends, and stakeholders' expectations,

**2.1.** The SETA strategic planning sessions will be conducted over a period of four (4) months, as follows::

**2.1.1.** April to July: Preparatory sessions (dates to be advised). The facilitator will be required to have brainstorming sessions with the FoodBev SETA management and board as the road to the main strategic planning session.

**2.1.2.** Management strategic session will be from 19 to 22 August 2024.

**2.1.3.** The board strategic session will be from 27 to 30 August 2024.

## 3. SPECIFICATION

The scope of work shall include but not limited to, the following tasks:

**3.1.** Pre-session preparation:

**3.1.1.** Conduct a thorough review of FoodBev SETAs existing strategic documents, performance reports and relevant sector data.

**3.1.2.** Engage with the Senior Manager Research Planning Monitoring and Evaluation, General Manager: Operations and CEO to plan for the workshop and understand expectations.

**3.1.3.** Develop a comprehensive agenda and session plan for the series of planning sessions including the main strategic session.

**3.1.4.** Manage time effectively to ensure all topics are adequately covered within the given timeframe.

**3.1.5.** Prepare materials, presentations, and exercises to facilitate discussions and decision making.

**3.1.6.** Ensure the Strategic documents are SMART and aligned to the Department of Planning, Monitoring and Evaluation (DPME) Framework for Strategic Plans and



Annual Performance Plan.

### 3.2. Facilitation of Planning Sessions:

- 3.2.1. Lead and facilitate the series of planning sessions, ensuring active participation and engagement from management and board members.
- 3.2.2. Foster a collaborative and inclusive environment conducive to constructive dialogue and decision-making.
- 3.2.3. Guide discussions on vision, mission, values, strategic outcomes and performance measures.
- 3.2.4. Facilitate SWOT analysis, scenario planning, and other strategic planning tools and techniques.
- 3.2.5. Document key insights, decisions and action points arising from the sessions.

### 3.3. Post-session reporting:

- 3.3.1. Consolidate the outcomes from the planning sessions into a comprehensive strategic planning report.
- 3.3.2. Present the findings and recommendations to the management and board for review and validation.
- 3.3.3. Incorporate feedback and finalise strategic planning documents, including 5-year strategic plan, and annual performance plan.

## 4. ROLE PLAYERS

The Senior Manager: Research Planning Monitoring and Evaluation will be the FoodBev SETA project lead who will be responsible for providing the service provider with all the required information.

## 5. EVALUATION CRITERIA

- 5.1. **Criteria 1: Compliance evaluation**– bidders will first be evaluated in terms of compliance, that is, meeting minimum requirements. Bidders who do not fulfil all the requirements or do not submit required documents using the required format, will be disqualified and not move on to the next stage of evaluations.
- 5.2. **Criteria 2: Functional criteria** – Functionality points are equal to 100 points. Bidders are required to achieve a minimum score of 70 points on functionality evaluations to qualify to be evaluated on Specific goals & Price. All bidders who do not score the minimum points will be disqualified.
- 5.3. **Criteria 3: Price and Specific goals** will be evaluated on an 80/20 preferential procurement principle for all bids above R2000 but below R50 million.

## 6. CRITERIA 1 - COMPLIANCE EVALUATION

- 6.1. Must be registered on the National Treasury CSD (Central Supplier database): A full report must be submitted.



- 6.2. Standard Bidding Documents (SBD) forms: (SBD 1, SBD 3.3, SBD 4, SBD 6.1, & SBD 7.2): completed and signed by the duly authorized person.
- 6.3. Tax clearance Pin.
- Failure to submit the above documents will result in the bidder being disqualified.

## 7. CRITERIA 2 - FUNCTIONALITY EVALUATION

Functional criteria	Weight
<b>1. Company experience (reference letters)</b>	
The bidder should have at least five (5) years' experience in the facilitation of strategic planning sessions. The bidder must provide a <b>minimum</b> of two (2) relevant reference letters or testimonials for similar work done in the last eight (8) years. The reference letters must be on the bidder's client's letterhead, duly signed by the authorized person, reflecting the level of service and performance provided by the bidder.	<b>15.00</b>
<ul style="list-style-type: none"> <li>▪ Less than one (1) reference letters/ testimonials submitted</li> </ul>	<b>0.00</b>
<ul style="list-style-type: none"> <li>▪ One (1) reference letters/ testimonials submitted</li> </ul>	<b>10.00</b>
<ul style="list-style-type: none"> <li>▪ Two (2) reference letters/ testimonials submitted</li> </ul>	<b>15.00</b>
<b>2. Qualifications and experience of the facilitator</b>	
The proposed facilitator must have the capacity and proven experience of successfully conducting strategic sessions. The proposed facilitator must have a minimum of NQF level 8 (Business Management, Industrial Psychology, Strategic Leadership or equivalent relevant qualification), and a minimum of five (5) years of experience in facilitating strategic session.	<b>15.00</b>
Therefore, the following must be submitted:	
2.1. Certified copies of qualifications	
2.2. CV demonstrating relevant experience.	
<ul style="list-style-type: none"> <li>▪ Less than five (5) years' experience and no relevant qualifications.</li> </ul>	
<ul style="list-style-type: none"> <li>▪ Five (5) years' experience and relevant qualifications.</li> </ul>	<b>10.00</b>
<ul style="list-style-type: none"> <li>▪ More than five (5) years' experience and relevant qualifications.</li> </ul>	<b>15.00</b>
<b>3. Project Team member</b>	
The bidder must provide a CV of the team member or assistant/scriber highlighting skills and experience in providing similar services as well as the certified copies of relevant qualifications. The CV must demonstrate a <b>minimum</b> of 3 years' experience in executing project of similar nature and a <b>minimum</b> of relevant NQF level 6 qualification.	<b>10.00</b>



▪ Less than three (3) years of experience and relevant qualifications.	<b>0.00</b>	
▪ Three (3) years of experience and relevant qualifications.	<b>5.00</b>	
▪ More than three (3) years of experience and relevant qualifications.	<b>10.00</b>	
<b>4. Proof of Experience in facilitation of strategic sessions</b>		<b>Weight</b>
The bidder must provide an approved sample report of previous work done for strategic planning sessions in the last eight (8) years. Bidder does not have to divulge confidential information.		<b>10.00</b>
▪ No sample report submitted	<b>0.00</b>	
▪ One or more sample report submitted	<b>10.00</b>	
<b>5. Methodology and approach</b>		<b>Weight</b>
The bidder should respond to these points, and include any other additional relevant information that will set the bidder apart:		
5.1 Bidder must provide clarity and an effective approach to facilitation of the strategic session.		
5.2 Familiarity with the education and trainings sector indicating experience in a SETA environment.		
5.3 Indicate how the facilitator will synthesize information and present findings effectively.		
5.4 The bidder must demonstrate an understanding of public sector dynamics – knowledge of the unique challenges, regulations, and decision-making processes within the public sector.		
5.5 The bidder must demonstrate familiarity with public policy frameworks, governance structures, and accountability mechanisms.		
5.6 Bidder must demonstrate understanding of organisations context, mission, and objectives of the SETAs, this should include the awareness of the organization’s mandate, stakeholders, and operating environment.		
5.7 The bidder should demonstrate knowledge of strategic planning principles, tools, and best practices and how he will assist management translate strategic goals into actionable plans.		
▪ Methodology and approach not submitted or does not cover any point under 5.1 to 5.7	<b>0.00</b>	<b>50.00</b>
▪ Methodology and approach covering three (3) points under 5.1 to 5.7	<b>15.00</b>	
▪ Methodology and approach covering four (4) points under 5.1 to 5.7	<b>20.00</b>	



▪ Methodology and approach covering five (5) points under 5.1 to 5.7	<b>30.00</b>	
▪ Exceptional methodology and approach, covering all the points under 5.1 to 5.7	<b>50.00</b>	
<b>Total</b>		<b>100.00</b>

**Note: the minimum score for functionality is 70 points**

- Please note that the Evaluation Committee will use their own discretion to assess quality of all bid proposals received in relation to above functionality criteria and may further verify information submitted from relevant sources/your clients and use their own discretion to score the bidders proposal accordingly.
- It is the responsibility of the bidder to seek clarity by enquiry before submission of the final bid, where the criteria are construed to be ambiguous or confusing. Should there be a difference of interpretation between the bidders and FoodBev SETA, the SETA reserves the right to make a final ruling on such interpretation.
- FoodBev SETA may request clarification or additional information regarding any aspect of the tender document or proposal submitted. The bidders must supply the requested information within twenty-four (24) hours after receipt of a written request from supply chain office. Failure to submit such information may result in disqualification or non-award of functionality points.

## 8. PREFERENCE POINTS ALLOCATION

**8.1. 80/20 preference point system for acquisition of goods or services for Rand value from R2 000 and up to R50 million as follows:**

CRITERIA	MEANS OF VERIFICATION	POINTS
Price	Proposed Bid Price	80,00
Preference Points	Specific Goals	20,00
<b>Total Points</b>		<b>100,00</b>

**8.1.1.** The following allocation will determine the specific goals (20.00 points) for this tender process:

Category	% Allocation for each category	Points allocated
Black People Ownership	60%	12,00
Woman Ownership	40%	08,00
<b>Total</b>	<b>100%</b>	<b>20,00</b>



## 9. CONDITIONS OF CONTRACT

### The successful service provider undertakes:

- 9.1. To treat all relevant and available data and/or information provided by the FoodBev SETA and its employees strictly confidential;
- 9.2. Not to discuss or make any information available to any member of the public, press or other service provider/consultant or any other unauthorized person(s) except as authorized by the FoodBev SETA;
- 9.3. Not to copy or duplicate any software or documentation for private use;
- 9.4. To give back to the FoodBev SETA all documentation, reports, programmes etc. upon completion of the project;
- 9.5. General conditions of tender, contracts and orders will be applicable in the execution of the contract;
- 9.6. Parking and travel between the prospective service provider's home/office and the FoodBev SETA will be borne by the Service Provider;
- 9.7. Failure to adhere to the above conditions will lead to the invalidation of the quotation;
- 9.8. The FoodBev SETA reserves the right to discontinue work on any element of the quotation at any given time in consultation with the Senior Manager: Human Resources of the FoodBev SETA, for example the quality of work delivered is poor or the service provider is unduly delaying delivery of service;
- 9.9. Enter into a Service Level Agreement with the FoodBev SETA before the final acceptance of the tender proposal.
- 9.10. The Contract/SLA may be finalized within a period of maximum of five (5) working days for signature before commencement of the work. Bidders must note that FoodBev SETA contracts are vetted by outsourced lawyers therefore it is important to note that it is the responsibility of the bidder to also vet their contract before signing it off.
- 9.11. If two or more tenderers score an equal total number of points, the contract must be awarded to the tenderer that scored the highest points for specific goals.
- 9.12. If functionality is part of the evaluation process and two or more tenderers score equal total points and equal preference points for specific goals, the contract must be awarded to the tenderer that scored the highest points for functionality.
- 9.13. If two or more tenderers score equal total points in all respects, the award must be decided by the drawing of lots.

## 10. IMPORTANT INFORMATION TO NOTE - GUIDELINES

### 10.1. Disclosures

- a) Bidder to disclose if they have been subject to proceedings or other arrangements relating to bankruptcy or insolvency.

## 11. DISCLAIMER

- 11.1. FoodBev SETA reserves the right not to appoint a service provider
- 11.2. Not to appoint a bid that scored the highest points i.e., award a bid, on reasonable and justifiable grounds, to a bidder that did not score the highest points. Award the contract or any part thereof to one or more service providers
- 11.3. Reject all bids
- 11.4. Decline to consider any bids that do not conform to any aspect of the bidding requirements
- 11.5. Request further information from any bidder after the closing date for clarity purposes
- 11.6. Cancel this RFQ or any part thereof at any time



- 11.7. Require the shortlisted bidders to make presentations at the venue communicated with the bidder and this presentation will be made by the bidder at their own cost
- 11.8. Points scored will be rounded to 2 decimals
- 11.9. FoodBev SETA does not communicate with any bidders telephonically indicating that the bidder will be assisted to receive the award in return of financial resources. FoodBev SETA does not request bribes from any of the bidders and should a bidder receive such request, please that bidder must immediately notify FoodBev SETA and the police.

## 12. CONFIDENTIALITY

- 12.1. Bids submitted will not be revealed to any other bidders and will be treated with utmost confidentiality
- 12.2. All information pertaining to FoodBev SETA obtained by the bidder as a result of participation in this RFQ is confidential and must not be disclosed without written authorisation from the FoodBev SETA
- 12.3. The project lead will abide by FoodBev SETA Code of Conduct and all laws, rules and regulations that govern the SETA

## 13. MISCELLANEOUS

- 13.1. The service provider should include any additional information deemed useful to the FoodBev SETA in evaluating the proposal.

## 14. NEGOTIATIONS

- 14.1. FoodBev SETA will enter into negotiations to agree on fees, scope of work, scope of service, and other salient commercial terms with the preferred bidder.

## 15. VALIDITY

- 15.1. The proposal provided to FoodBev SETA in terms of this request for quotations will be valid for a period of 90 days from the date of submission with the exception of the Tax and B-BBEE certificates which must still be valid at the time of award.
- 15.2. Should there be a need to request extension of the finalization of the award of the bid, the bidders will be duly informed, and the tender/proposal will remain valid except for items mentioned above.

## 16. CONDITIONS OF PAYMENT

- 16.1. No service should be provided to FoodBev SETA before an official purchase order has been issued to the supplier. An invoice supported by all relevant documentation must be submitted to FoodBev SETA for certification and authorization before payment can be made. Invoices will be payable 30 days after receipt of the invoice and statement.

## 17. COST OF TENDERING/ PROVIDING QUOTATIONS

- 17.1. The bidders shall bear all costs and expenses associated with the preparation and submission of the tender document/proposal. FoodBev SETA shall under no circumstances be responsible and/or liable for any such costs, regardless of, and without limitation to the conduct or outcome of the tendering, evaluation and selection process. The bidder will have no claim against FoodBev SETA where bids are cancelled for whatever reason.





## 18. UNSUCCESSFUL BIDDERS

- 18.1. Please note FoodBev SETA's decision on the selection of the successful bidder is final and FoodBev will not enter into any further correspondence and/or negotiations with any unsuccessful bidder.

## 19. PROCEDURES FOR SUBMITTING QUOTATIONS

- 19.1. The **closing date** for proposals is **09 April 2024 @ 16h00**.

Suppliers must reach the FoodBev SETA before or on the closing date and time. Bidders must email their submissions to: [scm@foodbev.co.za](mailto:scm@foodbev.co.za).

### PREPARED BY:

Name: **Nkgaugelo Kgasago**  
Designation: **Manager: Research**  
Date: **28 March 2024**  
Signed: \_\_\_\_\_

### APPROVED BY:

Name: **Nokuthula Sibia**  
Designation: **Senior Manager: RPME**  
Date: **28 March 2024**  
Signed: \_\_\_\_\_

