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| <b>RFP NUMBER:</b>  | RFP/SASSETA/222311107  |
| <b>DESCRIPTION:</b>   | Procurement of a pool/panel of Learning Material Developers from the date of appointment until 31 March 2030   |
| <b>PUBLISH DATE:</b>  | 04 April 2024  |
| <b>CLOSING DATE:</b>  | 03 May 2024  |
| <b>CLOSING TIME:</b>  | 11h00 am   |
| <b>COMPULSORY BRIEFING SESSION DATE</b>   | N/A  |
| <b>VALIDITY PERIOD:</b>   | 120 days from the closing date   |
| <b>PREFERENCE POINT SYSTEM</b>  | 80/20  |
| <b>BID RESPONSES TO BE SUBMITTED ELECTRONICALLY:</b>  | Proposals are to be submitted electronically via email to <b>learningmaterial@sasseta.org.za</b> for the attention of Ms. Kholo Leshabane, Quoting the reference (RFP/SASSETA/222311107) |
| <b>ATTENTION:</b>   | Ms. Kholo Leshabane  |
| The email address (learningmaterial@sasseta.org.za) is for the submission of tender proposals only and will only be accessed by SASSETA after the tender closing date and time. |  |
| Queries related to this tender are to be sent to scm02@sasseta.org.za.  |  |

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***If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigation.***

## **DOCUMENTS IN THIS BID DOCUMENT PACK**

Bidders are to ensure that they have received all pages of this document, which consist of the following documents:

### **SECTION A**

1. RFP Submission Conditions and Instructions
2. Terms of Reference
3. Selection Process

### **SECTION B**

1. Special Conditions of Bid and Contract
2. Invitation to Quote (SBD 1)
3. Pricing Schedule (SBD 3.3)
4. Declaration of Interest (SBD 4)
5. Preference Points Claim form in terms of Preferential Procurement Regulations 2022 (SBD 6.1).
6. Submission Checklist
7. General Conditions of Contract (Annexure A)

**NB.: Bidders are required to return the SASSETA attached Standard Bidding (SBD) forms and not submit SBD forms from other entities.**

## 1. RFP SUBMISSION CONDITIONS AND INSTRUCTIONS

### 1.1 FRAUD AND CORRUPTION

- 1.1.1 All Service Providers are to take note of the implications of contravening the Prevention and Combating of Corrupt Activities Act, Act No 12 of 2004 and any other Act applicable.

### 1.2 COMPULSORY BRIEFING SESSION

- 1.2.1 There will be **no briefing session** for this Request for Proposal.

### 1.3 CLARIFICATIONS/QUERIES

- 1.3.1 Any clarification required by a bidder regarding the meaning or interpretation of the Terms of Reference, or any other aspect concerning the bid, is to be requested in writing (e-mail) from **Ms. Kholo Leshabane** at [scm02@sassetta.org.za](mailto:scm02@sassetta.org.za) by **12h00** on **25 April 2024**. The **bid number** should be mentioned in all correspondence. **Telephonic requests for clarification will not be accepted.**

### 1.4 SUBMITTING BIDS

- 1.4.1 Proposals to be submitted electronically via email to **learning material@sassetta.org.za (maximum size of the email 30 MB)**
- Bidders are advised to compress their submission(s) to a maximum of 30MB file/folder. **Any submission(s) exceeding 30MB will be automatically rejected by the server.**
  - Submission(s) can be made through the method of email, WeTransfer, google drive etc. **Bidders are advised NOT to set expiry date on the submission(s) made.**
  - Bidders are advised to double check their submission(s) before responding to the bid.

❖ Closing date and time: **03 May 2024 @ 11h00**

### 1.5 LATE BIDS

- 1.5.1 Bids received late shall not be considered. A bid will be considered late if it arrived only one second after 11h00 or any time thereafter. Bids arriving late will not be considered under any circumstances. Bidders are therefore strongly advised to ensure that bids be sent allowing enough time for any unforeseen events that may delay the delivery of the bid.

### 1.6 NEGOTIATION

- 1.6.1 SASSETA has the right to enter into negotiation with a prospective service provider regarding any terms and conditions, including price(s), of a proposed contract.

### 1.7 REASONS FOR REJECTION

- 1.7.1 SASSETA shall reject a bid for the award of a contract if the recommended bidder has committed a proven corrupt or fraudulent act in competing for the particular contract.

- 1.7.2 SASSETA may disregard the bid of any bidder if that bidder, or any of its directors:
  - 1.7.2.1 have abused the Supply Chain Management systems of SASSETA.
  - 1.7.2.2 have committed proven fraud or any other improper conduct in relation to such systems.
  - 1.7.2.3 have failed to perform on any previous contract and the proof exists.
- 1.7.3 Such actions shall be communicated to the National Treasury.

## **2. TERMS OF REFERENCE**

### **2.1. INTRODUCTION AND BACKGROUND**

- 2.1.1. SASSETA was established on 1 July 2005. It is one of the twenty-one Sector Education and Training Authorities (SETAs) established in terms of the Skills Development Act (Act 97 of 1998) as amended. SASSETA's licence has been renewed until 31st March 2030. SASSETA is classified as a schedule 3A Public Entity in terms of the Public Finance Management Act, (Act 1 of 1999, as amended). SASSETA reports to the Department of Higher Education and Training.
- 2.1.2. The ETQA has signed a Memorandum of Understanding (MoU) with Quality Council for Trades and Occupation (QCTO). Occupational qualifications have been re-aligned and approved by QCTO and therefore learning material need to be developed for the process of accreditation with the QCTO to take place. There is a need to appoint Learning Material Developers that will be working with SASSETA and stakeholders to develop the Occupational qualifications, Part- qualifications or Skills Programmes learning material.

### **2.2. PURPOSE**

- 2.2.1. The purpose of this request for proposals is to appoint a pool/panel (maximum five (5)) Learning Material Developers to develop learning material for Occupational Qualifications/Part-Qualifications/Skills Programme learning material.
- 2.2.2. Competent and experienced Learning Material Developers are needed for the occupational qualifications' development to ensure that qualifications are implemented and comply with the QCTO accreditation requirements. The appointed learning material developers will be allocated more than one Qualification/Part-Qualification/Skills Programme learning material each to be developed, as per the needs of the sub-sectors (chambers) and in accordance with applications received from industry stakeholders.

### **2.3. SCOPE OF WORK**

- 2.3.1. The successful service providers will be required to undertake the following:
  - 2.3.1.1. Work in an occupational qualifications' system,
  - 2.3.1.2. Capture data from stakeholders,
  - 2.3.1.3. Engage with the Development Quality Partners (DQP)
  - 2.3.1.4. Facilitate meetings with the identified Development Quality Partners and relevant Industry partners/experts,
  - 2.3.1.5. Prepare and submit reports to the ETQA Manager
- 2.3.2. Learning Material Developers shall be working with SASSETA during the process of occupational qualifications/Part-Qualifications/Skills Programmes development.

### **2.4. REQUIRED DELIVERABLES**

- 2.4.1. For each module in the respective curriculum components, the following deliverables will be developed and submitted:

#### **2.4.1.1. Knowledge Modules:**

- 2.4.1.1.1. Learner Guide (content related to the curriculum)
- 2.4.1.1.2. Learner Activity Guide (which may be included in the learner guide)
- 2.4.1.1.3. Facilitator Guide (focusing on time allocation and resources)
- 2.4.1.1.4. Assessor Guide (including activities and model answers for formative assessment)
- 2.4.1.1.5. Moderator Guide

#### **2.4.1.2. Practical Skills Modules:**

- 2.4.1.2.1. Learner Activity Guide
- 2.4.1.2.2. Facilitator Guide (focusing on preparation of aids for the demonstration)
- 2.4.1.2.3. Assessor Guide (checklist for formative assessment)

#### **2.4.1.3. Work Experience Modules:**

- 2.4.1.3.1. Workplace Logbook
- 2.4.1.3.2. Mentor Guide
- 2.4.1.3.3. Learning matrix

#### **2.4.1.4. As per QCTO occupational qualification curriculum document**

2.4.2. Submission: Electronic copy

- 2.4.2.1. All material will be submitted in a MS Word and MS Excel format (as applicable)

### **2.5. SKILLS AND EXPERIENCE OF THE BIDDING COMPANY AND THE TEAM MEMBER(S) PROPOSED FOR THE ASSIGNMENT**

2.5.1. The applicants should demonstrate the following skills and experience.

- 2.5.1.1. Submit a detailed methodology and project plan with a clear indication of timeframes milestones to be achieved and action plans.
- 2.5.1.2. Bidding company / Learning Material Developer to demonstrate three (3) or more learning materials developed for different clients that have commissioned the work by submitting signed reference letter(s) on previous/current client(s) letterhead with contact details confirming their satisfaction on service rendered in terms learning material development from any SETA /ETQA /Government Training Institutions
- 2.5.1.3. A detailed Curriculum vitae (CV) of Learning Material Developer demonstrating three (3) years or more experience in developing learning material and at least three (3) or more completed assignments for SETA/ETQA/Government Training Institutions to be attached.

### **2.6. MANDATORY REQUIREMENTS/ DISQUALIFICATION CRITERIA**

2.6.1. The Learning Material Developer to submit a certified copy of ETDP SETA learning programme developer statement of results (Unit standard

123394/123401) /OD ETD qualification (Qualification ID/ 50333/50334) / Bachelor of Education certificate NQF Level 7. **Non-submission will lead to disqualification**

**NB. International qualifications must be verified by SAQA and a copy of letter confirming the validity of the qualifications must be attached. Certified copy should not be older than six (6) months.**

## 2.7. TIMEFRAME FOR DELIVERY OF THE WORK

- 2.7.1. This contract will be from the date of appointment until 31 March 2030.  
2.7.2. The timeline allocated to develop one (1) occupational Qualification, Part-qualification, and Skills Programme should be concluded as follows:

| Programme               | Duration   |
|-------------------------|------------|
| Skills Programme        | 3 Months   |
| Part-Qualification      | 4-6 Months |
| Full Qualification      | 4-6 Months |
| Full/Part-Qualification | 4-6 Months |

## 2.8. PRICING

- 2.8.1. Bidders to complete SBD 3.3 as attached to this request in full and to submit their own detailed quotation on their Company letterhead inclusive of VAT and any other costs as per the requirements of the Terms of Reference. **Bidders to attach their quotation on the company letterhead in line with SBD 3.3**
- 2.8.2. **The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.**
- 2.8.3. **Where the contract requires the successful bidder to travel to a venue different from SASSETA, the following travel and disbursement processes will be undertaken:**
- Claim travel mileage costs applicable to this contract as per the Department of Transport rates
  - Book only economy-class flights
  - Book Group A hire cars, otherwise Group B are to be used for Service Providers outside of Gauteng.
  - Utilise cost-effective mode of transport such as Uber/Taxify/Gautrain or shuttle services when travelling to and from the airport
  - Book only Bed and Breakfast, Hotels, or other equivalent accommodations up to a Rand value of R1 400/ three (3) Star per night per person (including dinner, breakfast and parking).
  - Submit all applicable invoices/receipts for the travel undertaken and also a google map of the trip where travel by private car was undertaken for payment.
  - All travel to be approved by SASSETA before being undertaken

## 2.9. ACCOUNTABILITY AND REPORTING

- 2.9.1. The external verifiers will report directly to ETQA Manager and submit reports to SASSETA within seven (7) days of completion of work.

## **2.10. INTELLECTUAL PROPERTY**

2.10.1. The service provider will be contracting with SASSETA. All products and data of this project, in whatever format raw or analysed, will be confidential information for utilisation by SASSETA. All information and documents, received from SASSETA or stakeholders, is to be kept confidential and may not be used or distributed in any format without the written approval of SASSETA. To this end, the service provider will be required to sign a confidentiality agreement within the contract.

## **2.11. PROTECTION OF PERSONAL INFORMATION ACT**

2.11.1. All Service Providers are to take note of the implications of POPIA act and any other data privacy Act applicable that SASSETA complies to. In compliance to the act, please be advised that the following are applicable to the treatment of vendor information:

2.11.2. All requested bid information will be solemnly utilized for the purpose of the bid evaluation processes. The vendor hereby consents the information provided as part of this bid will be utilized for supply chain processes of SASSETA and may be subject to multiple processing to enable the evaluation of this bid.

2.11.3. The vendor consents that the information collected will be retained for the duration of the evaluation and archived for records management purposes. The information will be disposed as per the SASSETA records management policies as prescribed by the national archives act. Furthermore, the information owner acknowledges that the information provided will be scanned into digital records which are retained on the SASSETA backup servers and that are replicated to backup media. SASSETA does confirm that the organization adopts industry best practice with regards to the safeguarding of digital records whether locally stored or retained in backup media.

2.11.4. SASSETA confirms that all submitted records will be retained in their original form and will not be altered with to preserve the quality and originality of information provided.

2.11.5. SASSETA confirms that the Information Officer is duly responsible for vendor information provided and exercises stringent measures to ensure that information is secured and solemnly utilized for the purpose of use. No vendor records will be distributed or utilized for any processes outside the current bid that the information has been requested for.



### 3. PROPOSED SELECTION CRITERIA

#### 3.1 Compliance requirements

3.1.1 All bids duly lodged will be examined to determine compliance with bidding requirements and conditions.

#### 3.2 Conditions for selection/short listing

3.2.1 All submissions will be evaluated as follows:

##### 3.2.1.1 Phase 1 – Required items, Service Providers to:

- Submit their responses/bidding documents by the closing date and time. **Responses/bidding documents submitted after the date and time will be automatically disqualified from further evaluation.**
- The Learning Material Developer to submit a certified copy of ETDP SETA learning programme developer statement of results (Unit standard 123394/123401) /OD ETD qualification (Qualification ID/ 50333/50334)/Bachelor of Education certificate NQF Level 7. **Non-submission of the required certificate/document will lead to automatic disqualification. International qualifications not verified by SAQA will also be automatically disqualified.**
- complete and submit all Standard Bidding Documents (SBD) forms mentioned above on page 2 of this document, namely: SBD1, SBD 3.3, SBD 4, SBD 6.1.
- Bidders to be registered on the National Treasury Central Supplier Database (CSD) by the closing date and time of this request for quotation. Bidders are to provide SASSETA with a copy of their CSD registration report downloaded from the National Treasury CSD Website.
- Initial each page of the General Condition of Contract (Annexure A) and submit with your proposal.

##### 3.2.1.2 Phase 2 – Functionality evaluations

- All shortlisted proposals from phase 1 will be evaluated on the criteria provided in the table below. The proposals of all service providers will be rated on a scale of 0 to 2 as follows:
  - 0: Required document/item not submitted /Unacceptable, does not meet set criteria
  - 1: Satisfactory should be adequate for stated element
  - 2: Very good, above average compliance to the requirement

## PROPOSED SELECTION CRITERIA

| Element  | Functionality Evaluation |   | Functionality Weight | Total Score |
|--|--------------------------|---|----------------------|-------------|
| Bidding company to submit a detailed methodology and project plan with clear indication of timeframes and milestones to be achieved and related cost and action plans.   | 0                        | Bidder did not submit a project plan/project plan does not have clear timeframes and not aligned to the scope of work   | 30%                  |             |
|  | 1                        | Bidder submitted a project plan with clear indication of timeframes milestones to be achieved and related cost and action plans in accordance with SASSETA scope of work.   |                      |             |
| Bidding company / Learning Material Developer to demonstrate three (3) or more learning materials developed for single client/different clients that have commissioned the work by submitting three (3) or more signed reference letter(s) on previous/current client(s) letterhead with contact details confirming their satisfaction on service rendered in terms learning material development from any SETA/ETQA/Government Training Institutions<br><br><b>Reference letters can be for either the individual or the bidding company. The reference letters should specify Qualification/Part-Qualification/Skills Programme that have been developed previously.</b> | 0                        | Bidding company /Learning Material Developer did not demonstrate three (3) learning materials developed for single client/different clients that have commissioned the work by submitting one (1) signed reference letter on previous/current client letterhead with contact details confirming their satisfaction on service rendered in terms learning material development from any SETA/ETQA/Government Training Institutions                 | 40%                  |             |
|  | 1                        | Bidding company /Learning Material Developer demonstrate two (2) learning materials developed for single client/different clients that have commissioned the work by submitting two (2) signed reference letter(s) on previous/current client(s) letterhead with contact details confirming their satisfaction on service rendered in terms learning material development from any SETA/ETQA/Government Training Institutions                     |                      |             |
|  | 2                        | Bidding company /Learning Material Developer demonstrate three (3) or more learning materials developed for single client/different clients that have commissioned the work by submitting three (3) or more signed reference letter(s) on previous/current client(s) letterhead with contact details confirming their satisfaction on service rendered in terms learning material development from any SETA/ETQA/Government/Training Institutions |                      |             |
| A detailed Curriculum vitae (CV) of Learning Material Developer demonstrating three (3) years or more experience in developing learning material and at least three (3) or more completed assignments for SETA/ETQA/Government Training Institutions to be attached.   | 0                        | The Learning Material Developer did not demonstrate three (3) years or more years of experience in developing learning material/demonstrated one (1) completed assignment for SETA/ETQA/Government Training   | 30%                  |             |
|  | 1                        | CV of the Learning Material Developer demonstrates two (2) years of experience in undertaking learning material development. Demonstrated two (2) completed assignment for SETA/ETQA/Government Training  |                      |             |
|  | 2                        | CV of the Learning Material Developer demonstrates three (3) or more years of experience in undertaking learning material development. Demonstrated three (3) or more completed assignment for SETA/ETQA/Government Training  |                      |             |

Bidders are required to obtain 75% functionality threshold for them to be shortlisted for phase 3 of the evaluation process. **Bidders who do not score 75% for functionality will be disqualified from further evaluation.**

**3.2.1.3. Phase 3 – Price and Specific Goals**

**The value of this bid is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable where 80 points will be allocated to price and 20 points for Specific Goals as follows:**

| <b>Evaluation Criterion on Price and Specific Goals</b> |            |
|---|------------|
| Relative competitiveness of proposed price              | 80         |
| Specific Goals  | 20         |
| <b>TOTAL FOR PRICE AND SPECIFIC GOALS</b>               | <b>100</b> |

**3.3. ADJUDICATION OF BID**

- 3.3.1. The Bid Adjudication Committee will consider the recommendations of the Bid Evaluation Committee (BEC) and make a recommendation to the Award Authority to make the final award. The successful bidder will usually be the service provider scoring the highest number of points lower-scoring bid based on firm, verifiable and justifiable grounds, or no award at all.

## PART A - INVITATION TO BID

|  |  |               |   |  |   |
|--|--|---------------|---|--|---|
| <b>YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>   |  |               |   |  |   |
| BID NUMBER:  | RFP/SASSETA/222311107  | CLOSING DATE: | 03 May 2024   | CLOSING TIME:  | 11h00   |
| DESCRIPTION  | Procurement of a pool/panel of Learning Material Developers from the date of appointment until 31 March 2030 |               |   |  |   |
| <b>PROPOSALS TO BE EMAILED:</b>  |  |               |   |  |   |
| Proposals to be submitted electronically via email to learningmaterial@sassetta.org.za for the attention of Ms. Kholo Leshabane  |  |               |   |  |   |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>  |  |               | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>                                  |  |   |
| CONTACT PERSON   | Ms. Kholo Leshabane  |               | CONTACT PERSON  | Ms. Kholo Leshabane  |   |
| E-MAIL ADDRESS   | scm02@sassetta.org.za  |               | E-MAIL ADDRESS  | scm02@sassetta.org.za  |   |
| <b>SUPPLIER INFORMATION</b>  |  |               |   |  |   |
| NAME OF BIDDER   |  |               |   |  |   |
| POSTAL ADDRESS   |  |               |   |  |   |
| STREET ADDRESS   |  |               |   |  |   |
| TELEPHONE NUMBER   | CODE   |               | NUMBER  |  |   |
| CELLPHONE NUMBER   |  |               |   |  |   |
| FACSIMILE NUMBER   | CODE   |               | NUMBER  |  |   |
| E-MAIL ADDRESS   |  |               |   |  |   |
| VAT REGISTRATION NUMBER  |  |               |   |  |   |
| SUPPLIER COMPLIANCE STATUS   | TAX COMPLIANCE SYSTEM PIN:   |               | OR  | CENTRAL SUPPLIER DATABASE No:  | MAAA  |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE   | TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No                             |               | B-BBEE STATUS LEVEL SWORN AFFIDAVIT   |  | [TICK APPLICABLE BOX]<br><input type="checkbox"/> Yes <input type="checkbox"/> No |
| <b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES &amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>  |  |               |   |  |   |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?  | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ENCLOSE PROOF]                           |               | ARE YOU A FOREIGN BASED SUPPLIER FOR THE <b>GOODS /SERVICES /WORKS OFFERED?</b> | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES, ANSWER PART B:3 ] |   |
| <b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>  |  |               |   |  |   |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?  |  |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |  |   |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA?  |  |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |  |   |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?   |  |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |  |   |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?  |  |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |  |   |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?  |  |               | <input type="checkbox"/> YES <input type="checkbox"/> NO                        |  |   |
| <b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b> |  |               |   |  |   |

**PART B**

**TERMS AND CONDITIONS FOR BIDDING**

|  |
|--|
| <b>1. BID SUBMISSION:</b>  |
| 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.   |
| 1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>   |
| 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. |
| 1.4. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>   |
| <b>2. TAX COMPLIANCE REQUIREMENTS</b>  |
| 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.   |
| 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.  |
| 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.   |
| 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.   |
| 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.   |
| 2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.  |
| 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."                        |

**NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

**NAME OF SIGNATORY** .....

**SIGNATURE OF BIDDER:** .....

**N/B.:** If a Company has one director as listed on CSD, the one Director to sign these documents on behalf of the Company.  
Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Director.

**N/B.:** If the Company has more than one Director as listed on CSD, a signed Company Resolution to be attached to confirm that the one Director can sign on behalf of the Company. Any other member of the Company will require a Company Resolution to be attached to this submission signed by the duly Authorised Directors.

**CAPACITY UNDER WHICH THIS BID IS SIGNED:** .....  
(Proof of authority must be submitted e.g. company resolution)

**DATE:** .....

**PRICING SCHEDULE**  
**(Professional Services)**

|                       |                                |
|-----------------------|--------------------------------|
| NAME OF BIDDER: ..... | BID NO.: RFP/SASSETA/222311107 |
| CLOSING TIME: 11h00   | CLOSING DATE: 03 May 2024      |

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID

| ITEM NO | DESCRIPTION | BID PRICE IN RSA CURRENCY<br>**(ALL APPLICABLE TAXES INCLUDED) |
|---------|-------------|--|
|---------|-------------|--|

- The accompanying information must be used for the formulation of proposals.

| NO. | DETAILS   | Y1 – From the date of appointment to 31 March 2025 (incl. of VAT) |
|-----|---|---|
| 1.  | Cost for develop material for one (1) <u>skills program material</u> (with credits ranging between 8 and 60 credits per programme)          |   |
| 2.  | Cost to develop material for one (1) <u>part-qualification material</u> (with credits ranging between 25 and 119 credits per qualification) |   |
| 3.  | Cost to develop material for one (1) <u>full occupational qualification material</u> (with credits ranging between 120 to 390 credits)      |   |
| 4.  | Cost to develop material for one (1) <u>full occupational qualification material</u> (with credits ranging between 391 to 545 credits)      |   |
| 5.  | Cost to develop material for one (1) <u>full occupational qualification material</u> (with credits ranging from 546 and above and credits)  |   |

|    |   |  |
|----|---|--|
| 6. | Cost to develop material for one (1) <u>full occupational qualification and part qualification material</u> (with credits ranging between 120 to 390 credits)                   |  |
| 7. | Cost to develop material for one (1) <u>full occupational qualification and part qualification material</u> (with credits ranging between 391 to 545 credits per qualification) |  |
| 8. | Cost to develop material for one (1) full occupational qualification and part qualification material (with credits ranging from 546 and above per qualification)                |  |

**NB.: For the purposes of evaluation, total unit costs per scale will be utilised. Pricing should per qualification credits ranges on economies of scale.**

**Bidders will provide costs for the 1<sup>st</sup> year and SASSETA will apply CPIX from year two (2), from 01 April each year. Bidders to note that SASSETA may enter into price negotiations where required.**

Bidders are to record the name and surname of the proposed Learning Material Developer on this assignment and ensure that a comprehensive CV of this member is attached to the proposal as follows:

| NO. | ROLE IN THE PROJECT             | NAME AND SURNAME<br>(Bidders to indicate <u>one</u> (1) name below. If more than one (1) name is provided, SASSETA will evaluate the name of the resource at the top of the list only) | IS THE CV ATTACHED<br>( <i>circle the response below</i> ) | Is the <b>certified</b> copy of ETDP SETA learning programme developer statement of results/ OD ETD qualification/Bachelor of Education certificate attached? ( <i>circle the response below</i> ) |
|-----|---------------------------------|--|--|--|
| 1.  | 1 X Learning Material Developer |  | Yes/No   | Yes/No   |

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

**(To be signed by a duly Authorised Delegate)**

**BIDDER'S DISCLOSURE**

**1. PURPOSE OF THE FORM**

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

**2. Bidder's declaration**

**2.1** Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise, employed by the state? **YES/NO**

**2.1.1** If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table.

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |

**N/B. If more space required, Service providers are to copy this table onto their letterhead and provide information as per the table above**

**2.2** Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

**2.2.1** If so, furnish particulars:  
 .....  
 .....

**2.3** Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

**2.3.1** If so, furnish particulars:  
 .....



.....

### 3. DECLARATION

I, the undersigned, (name).....in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>1</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

<sup>1</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022**

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

**1. GENERAL CONDITIONS**

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included).

**1.2 To be completed by the organ of state**

- (a) (The applicable preference point system for this tender is the 80/20 preference point system.
- (b) The lowest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (c) Price; and
- (d) Specific Goals.

**1.4 To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

|  | <b>POINTS</b> |
|--|---------------|
| <b>PRICE</b>                                     | 80            |
| <b>SPECIFIC GOALS</b>                            | 20            |
| <b>Total points for Price and SPECIFIC GOALS</b> | <b>100</b>    |

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

**2. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES**

**2.1 POINTS AWARDED FOR THE PRICE**

**2.1.1 THE 80/20 PREFERENCE POINT SYSTEMS**

A maximum of 80 points is allocated for price on the following basis:

**80/20**

$$Ps = 80 \left( 1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

**2.2 POINTS AWARDED FOR SPECIFIC GOALS**

2.2.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender.

2.2.2 For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**

**Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)**

| The specific goals allocated points in terms of this bid | Number of points allocated (80/20 system) (To be completed by the organ of state) | Number of points claimed (80/20 system) (To be completed by the bidder) |
|--|---|---|
| Black People Ownership (at least 51%)                    | 10  |   |
| Black Women Ownership (at least 30%)                     | 5   |   |
| The Promotion of South African owned enterprises         | 5   |   |
| <b>Total Points</b>                                      | <b>20</b>   |   |

**DECLARATION WITH REGARD TO COMPANY/FIRM**

3.1. Name of company/firm.....

3.2. Company registration number: .....

3.3. TYPE OF COMPANY/ FIRM

Partnership/Joint Venture / Consortium

- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

3.4. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary.

|   |
|---|
| <p>.....<br/> <b>SIGNATURE(S) OF TENDERER(S)</b></p>                |
| <p><b>SURNAME AND NAME:</b> .....</p>                               |
| <p><b>DATE:</b> .....</p>   |
| <p><b>ADDRESS:</b> .....</p> <p>.....</p> <p>.....</p> <p>.....</p> |

**DOCUMENTS REQUIRED FOR CLAIMING SPECIFIC GOALS**

As per bullet 1.6 and 1.7 of the Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, bidders are required to submit the SASSETA verification document(s) in order to be allocated the specific goals claimed:

- a) An Original/Certified copy of a valid B-BBEE Certificate or Sworn Affidavit.
- b) Valid Companies and Intellectual Property Commission (CIPC) Company registration documents
- c) Certified copy/ies of Identity documents of the Company Directors
- d) CSD report
- e) medical report (if any)
- f) declaration letter signed by the bidder.

**NB.: Non-submission of the documents required above will lead to specific goal points NOT being awarded.**

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of bidder**

**(To be signed by a duly Authorised Delegate. A signed Company Resolution must be submitted).**

***If you receive any suspicious calls asking for payment to secure an award of a bid or that the outcome of a tender can be influenced in your favour, please immediately inform the SASSETA Anti-Corruption Hotline at 0800 204 143 for further investigation.***

**BIDDERS ARE ENCOURAGED TO USE THE FOLLOWING CHECKLIST WHEN SUBMITTING THEIR BIDS:**

| NO. | DETAILS   | TICK BY BIDDER |
|-----|---|----------------|
| 1.  | Part 1: Completed and signed the invitation to bid document (SBD 1)<br><b>• To be signed by a duly Authorised Delegate.</b>   |                |
| 2.  | Part 2: Completed and signed pricing schedule (SBD 3.3)<br><b>• To be signed by a duly Authorised Delegate</b>  |                |
| 3.  | Part 3: Completed and signed the bidder's declaration (SBD 4). <i>(In case of a consortium/ joint venture, or where sub-Service providers are utilised, each party to the bid to complete and sign the declaration of interest document)</i><br><b>• To be signed by a duly Authorised Delegate</b>   |                |
| 4.  | Part 4: Completed and signed the Preference Points Claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)<br><b>To be signed by a duly Authorised Delegate.</b>   |                |
| 5.  | Part 5: Submitted the General Conditions of Contract (initialled each page)   |                |
| 6.  | Part 6: Bidders to submit their National Treasury Central Supplier Database (CSD) registration document.  |                |
| 7.  | Part 7: Bidder's attached quotation on the Company letterhead inclusive of VAT and any other applicable costs in line with the SBD 3.3  |                |
| 8.  | Part 8: Submit a detailed methodology and project plan with a clear indication of timeframes milestones to be achieved and action plans.  |                |
| 9.  | Part 9: Bidding company / Learning Material Developer to demonstrate three (3) or more learning materials developed for single client /different clients that have commissioned the work by submitting signed reference letter(s) on previous/current client(s) letterhead with contact details confirming their satisfaction on service rendered in terms learning material development from any SETA /ETQA /Government/Private Institutions |                |
| 10. | Part 10: A detailed Curriculum vitae (CV) of Learning Material Developer demonstrating three (3) years or more experience in developing learning material and at least three (3) or more completed assignments for SETA/ETQA/Government Training Institutions to be attached.   |                |
| 11. | Part 11: Bidders to submit:<br><b>NB.: Non-submission of the below-mentioned documents (under 6) will lead to specific goal points NOT being awarded.</b>   |                |
|     | Valid Companies and Intellectual Property Commission (CIPC) Company registration documents  |                |
|     | Certified copy of Identity document of company directors  |                |

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