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Education, Training and Development Practices Sector Education and Training Authority

RFQ NO: 09 - 2026/27

REQUEST FOR QUOTATIONS

TERMS OF REFERENCE FOR APPOINTMENT OF SERVICE PROVIDER OR CONSULTANTS/TEAM TO WORK WITH THE SETA ON IMPLEMENTATION EVALUATION OF ETDP SETA PROGRAMMES

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 ETD sector.

The ETDP SETA will host a **Non-Compulsory** briefing session for **RFQ NO: 09 - 2026/27 – Appointment of service provider or consultants/team to work with the seta on implementation evaluation of ETDP SETA programmes on 22 July 2026 at 10H00. Kindly use the link below to login. The closing date is 31 July 2026. Kindly note that interested service providers may submit their questions until 23 July 2026 at 12h00. No further questions will be accepted after this date.** We thank you for your cooperation.

Microsoft Teams meeting

Join: <https://teams.microsoft.com/meet/332650628893822?p=30C8hN8LUk225UAtey>

Meeting ID: 332 650 628 893 822

Passcode: hU9iX6FM

2. PURPOSE & OBJECTIVES

2.1 BACKGROUND, PURPOSE OF THE PROJECT AND PROJECT REQUIREMENTS

The ETDP SETA is implementing several programmes as indicated in the 5yrs Strategic Plan and Annual Performance (SP/APP). The interventions are meant to provide the beneficiaries with relevant skills to achieve competence in occupationally directed programmes from intermediate and high-level skills, more importantly to provide them with workplace experience for current and future employment.

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The SP/APP represent the break-down of estimated numbers of beneficiaries (employed and unemployed) who should be enrolled and completed these interventions in the respective years.

2.2 PURPOSE OF THE PROJECT

The purpose of the project is aligned with **FMPPI performance information use principles which is to:**

- Assess whether **performance information reflects actual implementation**
- Support **evidence-based decision-making**
- Strengthen **accountability for outputs and service delivery**
- Improve **planning, budgeting, and reporting systems**

2.3 OBJECTIVES OF THE STUDY

- Assess the extent to which **inputs were converted into outputs efficiently**
- Evaluate implementation against **planned targets and indicators**
- Assess **data quality and performance information systems**
- Identify constraints affecting delivery of outputs
- Provide recommendations to improve **economy, efficiency, effectiveness**

2.4 KEY EVALUATION QUESTIONS (ALIGNED TO FMPPI DIMENSIONS)

2.4.1 Inputs (Economy)

- Were resources (financial, HR, infrastructure) adequate and used cost-effectively?
- Were procurement and budgeting processes aligned with plans?

2.4.2 Activities (Operational Performance)

- Were planned activities implemented as scheduled?
- What operational challenges were encountered?

2.4.3 Outputs (Effectiveness at Output Level)

- Were outputs delivered in line with indicators and annual performance targets?
- What is the variance between planned and actual outputs?

2.4.4 Outcomes (Early Signals)

- Are there early indications that outputs are contributing to intended outcomes?

2.4.5 Performance Information Systems

- Are indicators **well-defined, verifiable, and aligned to FMPPI standards?**
- Is data **valid, reliable, timely, and complete?**

- Are reporting systems aligned with **APP and quarterly performance reporting**?

2.4.6 Efficiency

- Were outputs delivered within planned timeframes and budgets?
- What are the cost drivers and bottlenecks?

2.4.7 Governance & Accountability

- Are roles and responsibilities for performance reporting clearly defined?
- Are internal controls and oversight mechanisms effective?

3. PROJECT REQUIREMENTS

3.1 Scope of Work

The appointed consultants or a team or service will be required to clearly define:

- Programme components linked to **APP targets**
- Indicators under review (particularly output indicators)
- Reporting cycles (quarterly, annual)
- Institutions or implementing agents
- Geographic coverage

Develop

- Study designs
- Tools and sampling method
- Collect and analyse data
- Prepare reports
- Present findings to SETA stakeholders

3.2 Evaluation Approach & Methodology (FMPPI-Compliant)

3.2.1. Evaluation Design

- Theory-based approach using **logic model/results chain (inputs → activities → outputs → outcomes)**
- Process/implementation evaluation

3.2.2. Data Collection

Aligned to performance information verification:

- Review of:

- Annual Performance Plans (APPs)
 - Operational Plans
 - Quarterly Performance Reports
 - Technical Indicator Descriptions (TIDs)
- Interviews with:
 - Programme managers
 - M&E officials
 - Implementing partners
- Site verification of outputs
- Beneficiary feedback (where applicable)

3.2.3 Sampling

- Selection based on:
 - Performance risk areas
 - Under- or over-performing indicators
 - Geographic spread

3.2.4 Data Analysis

- Comparison of:
 - Planned vs actual targets
 - Reported vs verified performance
- Root cause (bottleneck) analysis
- Trend analysis across reporting periods

3.2.5 Data Quality Assessment

Use DPME/NT data quality dimensions:

- Validity
- Accuracy
- Completeness
- Reliability
- Timeliness

3.3 Project Deliverables

Deliverable	Description
Inception Report	Evaluation framework, methodology, indicators mapping
Indicator Assessment Matrix	Alignment of indicators to FMPPi standards
Data Quality Assessment Report	Quality of performance data
Draft Evaluation Report	Findings on implementation performance
Validation Workshop	Stakeholder engagement on findings
Final Report	Finalised report with actionable recommendations

3.4 Project Timelines

Typical duration of the project is **8–12 weeks, in the following phases:**

- Inception & planning
- Data collection & verification
- Analysis
- Reporting
- Dissemination

3.5 Required Expertise

- Programme performance monitoring (FMPPi expertise)
- Public sector planning (APPs, TIDs)
- Data quality assessment
- Evaluation methods (qualitative + quantitative)
- Knowledge of South African government systems

3.6 Budget

The budget must include costed workplan and payment schedule clearly indicate the total price in South Africa rand, inclusive of VAT for each study. The payment of the appointed service provider will be according to the proposed payment schedule and will be based on the actual quoted price.

3.7 Ethics and Evaluation Studies Statement

- Compliance with **DPME and public service ethical standards**
- Protection of administrative and performance data

- Confidentiality of respondents

3.8 Quality Assurance

- Alignment with:
 - **FMPPi (National Treasury)**
 - **DPME Evaluation Guidelines**
 - **National Evaluation System (NES) standards**
- Peer review and technical validation
- Use of **standard indicator assessment tools**

4. COSTING MODEL

COST COMPARISON FOR THE STUDIES

NB: The service provider must submit an itemised budget proposal, clearly indicating the cost per unit.

COSTING REQUIREMENTS			
NAME OF BIDDING ORGANISATION:			
ITEM DESCRIPTION	UNIT COST	AMOUNT	COMMENTS
Labour costs			
Project management and overheads (25%)			
Total project budget			
Detailed activity-based labour budget as outlined in 3.3 above			
Inception Report			
Indicator Assessment Matrix			
Data Quality Assessment Report			
Draft Evaluation Report			
Validation Workshop			
Final Report			
Other			
TOTAL LABOUR COSTS			
VAT @15%			
TOTAL COSTS			
ALL COSTS MUST BE INCLUSIVE OF VAT			

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

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.

5. DURATION OF THE PROJECT

The successful service providers will be required to enter a formal contract with the ETDP SETA by signing a Service Level Agreement (**SLA**). The contract will become effective on the date of last signature and will be initiated through a commencement meeting between the two parties. The contract period shall not exceed **the six months** from the date of project commencement.

6. METHOD OF SUBMISSION

All Documents for Stage 1 (Administrative requirements), Stage 2: (Functionality Evaluation), and Stage 3 (Pricing & Specific Goals) must be submitted in electronic format via email to etdpsetarfq@etdpseta.org.za

There must be three folders covering the following stages:

Folder A: Stage 1: Administrative Requirements

Folder B: Stage 2: Functionality Evaluation Requirements

Folder C: Stage 3: Price and Specific Goal

It is the responsibility of the bidder to ensure that all relevant documents are included to ensure efficient evaluation of its proposal. ETDP SETA will not take any responsibility for any missing information in the submissions.

7. EVALUATION CRITERIA

The evaluation criteria for the assessment of the proposals will be based on both qualitative and financial aspects of the proposal. Service Providers will be evaluated on functionality. The bidders that score points which equal to or exceed the minimum threshold provided on functionality will further be evaluated on price and specific goals.

The Bid documents will be evaluated individually on a score sheet, by a representative of the evaluation panel according to the evaluation criteria indicated in the Terms of Reference.

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.

7.1. STAGE 1: ADMINISTRATIVE COMPLIANCE [Folder A]

Bidders will be evaluated on the submission of the requested administrative documents. Fully completed and signed forms with witnesses' signature must be submitted and all applicable boxes be ticked.

Description	Comply/Submitted
Completion of all SBD Forms: • SBD 1 - Invitation to Bid • SBD 4 - Declaration of Interest	
Completion in full of the General Conditions of Contract (GCC)	
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	

7.2. STAGE 2_FUNCTIONALITY REQUIREMENTS [Folder B]

- The minimum qualifying score for functionality will be **80 points** and bids that fail to achieve the minimum qualifying score will be eliminated.
- Only bids that achieved the minimum qualifying score/ percentage 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	Evaluation CRITERIA	Method of evaluation	POINTS
1.	Organisational Experience & Expertise: (24 Points) Proof of project management and evaluations experience with contactable references attached. * Each reference letter must clearly indicate: - Be on the client's letterhead, - Name of the project, - Nature of similar service rendered, - Confirm the status of project (s) [Current or Completed], - Have recommendations and contact details, and - Be signed. NB: Reference letters (within 10yrs) must be on a company letter head, signed and dated, otherwise they cannot be considered. 1.1. Execution of similar projects: Contactable references (for projects within past 10yrs): 12 Points 1.2. Number of Years' Experience in project management and conducting evaluations: (12 Points)	▪ Three (03) or more reference letters 12 ▪ Two (02) reference 7 ▪ One (01) reference letter 3 ▪ No reference letter 0 ▪ Five (05) years or more 12 ▪ Three (03) – Four (04) years 7 ▪ One (01) – Two (2) years 3 ▪ Less than one (01) year 0	
2.	Capacity of the project team and experience: 2.1. Project manager who has 5yrs project management experience and 3yrs evaluation experience (4.5) 2.2. Qualifications of a Project Manager. (4.5) 2.3 Experience of Evaluation Specialist in conducting similar projects. (4.5)	▪ 5yrs project management & 3yrs evaluations or more 4.5 ▪ Three (3) – Four (4) years 3 ▪ One (1) – Two (2) years 2 ▪ Less than one (01) year 0 ▪ Master's Degree or equivalent 4.5 ▪ Honour's Degree/equivalent at NQF Level 8 or equivalent 3 ▪ Three (3) years or more 4.5 ▪ Two (2) years 3 ▪ One (1) year 2 ▪ Less than one (1) year 0	

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	2.4 Qualifications of an Evaluation Specialist. (4.5)	- Master's Degree or equivalent - Honour's Degree or Equivalent NQF L8	4.5 3
	2.5 Experience of Sector Specialist in skills development in the ETD sector. (4.5)	- Three (3) years or more - Two (2) years - One (1) year - Less than one (1) year	4.5 3 2 0
	2.6 Qualifications of a Sector Specialist. (4.5)	- Honours Degree or equivalent NQF L8 - Batchelor's Degree or equivalent	4.5 3
	2.7 Qualifications of two (2) Research Interns. (9) <i>*Note: No changes should be made to the team without prior consultation with the ETDP SETA.</i>	- Both Master' Degree or equivalent - Both Honours Degree or equivalent NQF L8 or mix of both qualifications.	9 6
	Technical proposal of the project: 3.1 Understanding the task and responsiveness to the ToRs 3.2 Demonstration of broader understanding of the ETD within context of the study 3.3 Research methodology: full description of the study design (including project plan data collection and data analysis approach, 3.4 Indication of resources and allocation 3.5 Deliverables with realistic milestones and timeframes. 3.6 Risks and mitigation strategies NB: at contracting /role of SCM discussion	- All 6 criteria met. - Only 1-6 criteria met - Only 1-5 criteria met - Only 1- 4 criteria met - Zero (0) met	40 30 20 10 0
TOTAL			100

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

Points will be awarded on a sliding scale

Please take note of the value and scoring point system of your bid.

7.3. STAGE 3: PRICING & SPECIFIC GOALS [Folder C]

PRICING SCHEDULE DOCUMENTS

- a. Costing Model (*Price must be final, include VAT and signed*)
- b. 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*

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

✓ Price	80
✓ Allocation of specific goals	20

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 reserves the right to cancel the bid and not award the bid to any of the bids.
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.
7. Bids submitted are to hold good for a period of **90 days**.
8. No sub-contracting will be allowed for this bid.
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** provide 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 points for specific goals for B-BBEE status level of contribution are not claimed.
11. 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.
12. 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.
13. Companies that are in the process of de-registration in the CIPC will not be considered.
14. Service Provider must provide proof of Public Liability Insurance prior to the signing of a Service Level Agreement.
15. The ETDP SETA remains the sole owner and custodian of all content, material, or any other form of development. No information on 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. DISCLAIMER

Protection of Personal Information Act 4 of 2013 (POPIA) and Promotion of Access to Information Act 2 of 2000 (PAIA) Disclaimer

1. By submitting your proposal, you grant the necessary consent as you acknowledge that:
 - ETDP SETA treats data it gathers and personal information it collects, holds and/or processes as private.
2. Therefore:

Your right to privacy and security is very important to us. The ETDP SETA as a responsible party treats personal information of data subjects as private and confidential. To that end, we collect personal information for the purposes set out in this document or otherwise the specific purpose(s) communicated to you.
3. We may also use your information for a number of different purposes, for example to fulfil our legal and regulatory obligations of the SETA.
4. For more detailed information on how and why we may use your information, including the rights in relation to your personal data, and our legal grounds for collection, processing and using it, please view the ETDP SETA Protection of Personal Information Policy and Promotion of Access to Information Manual on our website: www.etdpseta.org.za "ETDP SETA PAIA Manual and POPIA Manual".

10. BID DOCUMENTS/ PROPOSAL PACKS

Bid documents for participation will be available on national treasury e-portal and our website. Documents **must** be downloaded from the ETDP SETA website: www.etdpseta.org.za , Main Menu > Supply Chain Management > Open RFQs as from **12h00** on **13 July 2026**.

All Proposals **must be Sent via email to** etdpsetarfq@etdpseta.org.za

Submissions must be sent **BEFORE** the closing date and time of **11h00** on **31 July 2026**.

No late submission will be accepted!

11. CLOSING DATE

All Proposals should reach the ETDP SETA Offices on or before **11h00** on **31 July 2026**.

12. 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: Tenderers@etdpseta.org.za

Note: Struck off Legal Practitioners or Legal Practitioners not Registered on the Roll of the LPC, as well as 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 Project Manager, Specialists and Interns.

1. PROJECT MANAGER EXPERIENCE

Name of Project Manager: _____

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

2. RELEVANT EXPERIENCE OF EVALUATION AND SECTOR SPECIALIST

Name of Specialist: _____

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

3. INTERNS

Name of Intern 1: _____

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

INTERNS

Name of Intern 2: _____

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