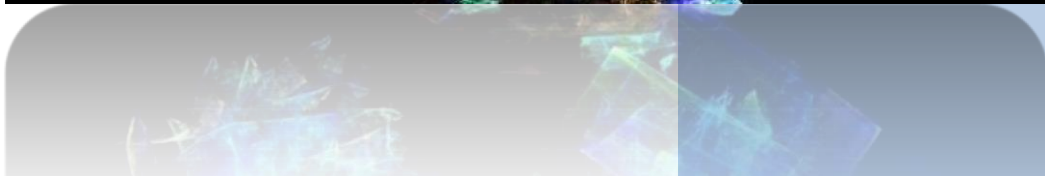
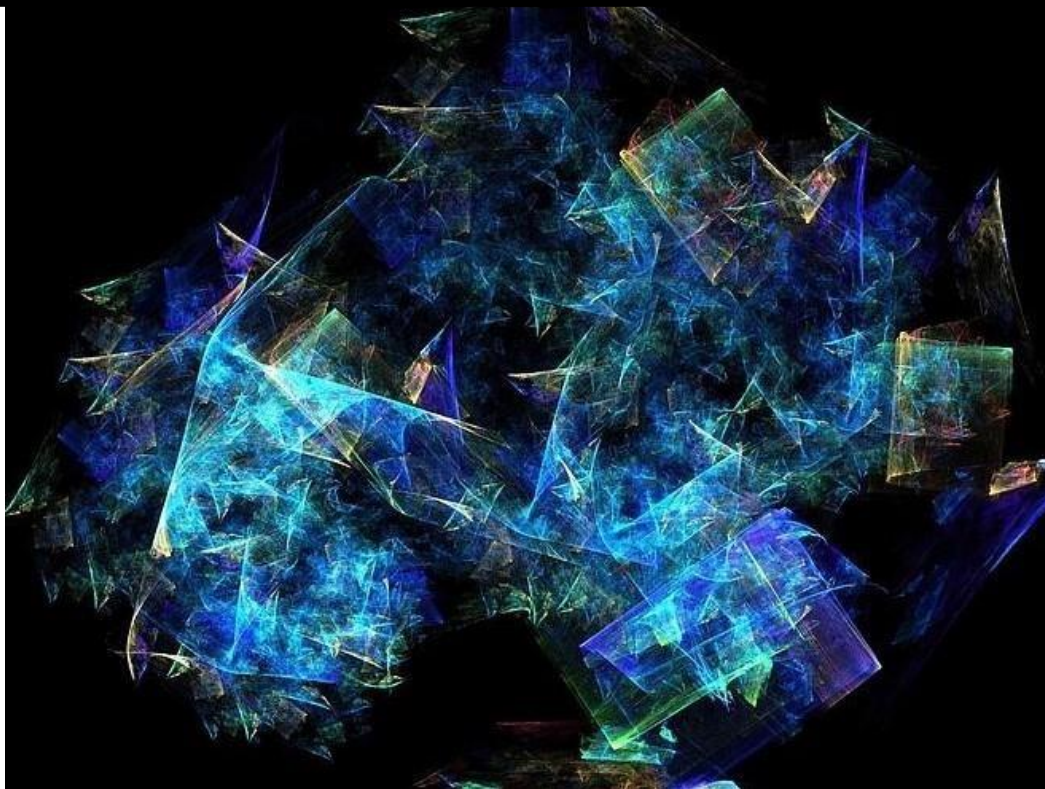




2022

TERMS OF REFERENCE  
ETDP SETA FUNDED TRAINING  
*Manage Risk, Knowledge, Finance and  
Ethics Skills Programme*



## Background

Over the last several years, successive NSDS and NSDP mandates have been released, including the recent NSDP 2030 document. The Department of Higher Education and Training is dependent on the various stakeholders in skills development for the successful implementation of these desired imperatives and outcomes.

APPETD, through its activities in promoting unity, excellence and diversity within the private provider sector to the benefit of its members and its constituents, has been granted funding by ETDP SETA to manage the sourcing and implementation of training for relevant skills programme(s) by accredited private provider(s).

It is envisaged that the project deliverables will be addressed through the utilisation of existing APPETD member provider(s) in good standing.

### 1. Introduction

APPETD is seeking a private provider that is accredited by the relevant SETA, to offer the unit-standard-based skills programme named 'Manage Risk, Knowledge, Finance and Ethics'.

The skills programme will comprise 2 phases:

Phase 1:

Will be the delivery of the theoretical component of these themes contained in the unit standards and must comprise at least the principles and theory underpinning the 8-unit standards. This must be delivered over a period of 10 days.

Phase 2:

This phase comprises the application phase of these theories and principles, in which the participants demonstrate how these activities are applied in practice, through projects developed for this purpose by the provider.

Assessment of the projects will be done by the service provider and then verified by the relevant SETA, and learner data uploaded.

#### **A) Manage Risk, Knowledge, Finance and Ethics Skills Programme**

UNIT STANDARD	NAME	NQF LEVEL	CREDITS
252025	Monitor, assess and manage risk.	5	8
252044	Apply the principles of knowledge management.	5	6
252036	Apply mathematical analysis to economic and financial information.	5	6
252040	Manage the finances of a unit.	5	8

252042	Apply the principles of ethics to improve organisational culture.	5	5
114596	Research the viability of new venture opportunities/ideas.	4	5
114592	Produce business plans for a new venture.	4	8
263534	Implement an action plan for a new venture.	4	4
		<b>TOTAL</b>	<b>50</b>

## 2. Profile of the training provider

### A) ACCREDITATION

1. The Training Provider must provide confirmation of accreditation with the relevant accrediting SETA for this skills programme.
2. The Training Provider must have a proven track record of at least 3 years in delivering this skills programme.
3. The Training Provider must provide confirmation of accredited facilitator, assessor and moderator.
4. The Training Provider must be financially sustainable to complete the key deliverables of this capacity building programme as set out in this Terms of Reference.

### B) PROOF OF SIMILAR PROJECTS

1. The Training Provider must provide an indication of similar projects undertaken in the past three years, indicating the scope, completion and success rates per project.
2. The Training Provider must provide a minimum three (3) contactable references regarding prior training programmes conducted.

## 3. Learner Entry requirements/ Pre-requisites

The Training Provider must confirm awareness of and adherence to the following:

- Learners must be employed within the ETD sector
- Learners must be proficient in English at NQF level 4 (Grade 12)

## 4. Scope of Work

### A) FACILITATION AND ASSESSMENT

1. Facilitate this Skills Development programme stipulated in this Expression of Interest utilising a hybrid platform and manage submission of assessments requirements.

2. Design and development of learning materials.
3. Provide learners with appropriate learning and reference materials adapted to a hybrid platform format.
4. Printing of all training related materials and certificate of attendance/competence.
5. Provide learner support to ensure learners achieve competency in the programme.
6. Ensure and provide signed attendance registers and learner registration documentation as evidence of attendance and completion of training.
7. Identify and assist learners with special educational and training needs.
8. Monitor and evaluate internal moderation processes.
9. Design, development of assessment tools and assessment of learners.
10. Moderation, verification, and upload onto the relevant SETA's Management Information System and present evidence of this upload to APPETD.
11. Issue certificates of competence and/or Statements of Results of the Skills programme.
12. Provide and arrange all logistical needs i.e., venue, catering etc.

#### **B) PLANNING AND SUPPORT**

2. Prepare training reports as part of key deliverables on conclusion of training of phase 1 and phase 2 and on completion of assessment.
3. Prepare an implementation plan for the Skills Development programme indicating time frames, project staff, budget, hybrid platform to be used and contingency plans.
4. A budget indicative of training providers financial stability and ability to complete project successfully as per key deliverables and timeframes.
5. **The training provider must be able to start training on 10 October 2022 and conclude training on the 24 October 2022.**

#### **5. Costing Model**

**A) SKILLS PROGRAMME(s) 2022: THIS COSTING MODEL MUST BE COMPLETED IN THIS FORMAT.**

<b>NUMBER OF LEARNERS INDICATED:</b>	<b>56</b>
<b>PROVINCE(s):</b>	<b>All (Hybrid)</b>

**NUMBER OF CREDITS:**

**Total 50 credits**

**UNIT STANDARDS:**

UNIT STANDARD	NAME	NQF LEVEL	CREDITS
252025	Monitor, assess and manage risk.	5	8
252044	Apply the principles of knowledge management.	5	6
252036	Apply mathematical analysis to economic and financial information.	5	6
252040	Manage the finances of a unit.	5	8
252042	Apply the principles of ethics to improve organisational culture.	5	5
114596	Research the viability of new venture opportunities/ideas.	4	5
114592	Produce business plans for a new venture.	4	8
263534	Implement an action plan for a new venture.	4	4

**NUMBER OF TRAINING DAYS:**

**8**

ITEM DESCRIPTION	NO. OF LEARNERS	UNIT COST	AMOUNT	COMMENTS
Tuition/Training Fee				
• Facilitation	56			
• Training Material	56			
• Assessment	56			
• Moderation	56			
<b>SUB- TOTAL (zero rated)</b>				
Hybrid methodology				

Data usage				
Certification				
Travel-related costs				Indicate breakdown
<b>SUB-TOTAL</b>				
<b>TOTAL COSTS</b>				
	56	R	R	Max. cost Per Learner
<b>THE FINAL AMOUNT MUST BE BETWEEN R900 000 AND R1 000 000, WHICH MUST INCLUDE THE 30% PAYABLE TO APPETD.</b>				

An Expression of Interest covering letter is required, along with the items listed below.

## 6. Evaluation Criteria

**THE APPETD applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2017.**

### 6.1 STAGE 1

Entails the submission of **mandatory documents required in order to be eligible for evaluation.**

1. Covering Letter and description/profile of the organisation
2. Relevant SETA Accreditation Certificate
3. Original valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS" – SBD 2
4. Declaration of Interest – SBD 4
5. Declaration of Bidder's Past Supply Chain Practices – SBD 8
6. Certificate of Independent Bid Determination – SBD 9
7. CIPC registration documents
8. Certified copies of IDs of shareholders/directors which must not be older than 3 months.
9. Central Supplier Database Registration Report
10. Proof of APPETD Membership
11. APPETD Members that received APPETD/ETDP SETA Funding in the past 12 months do not qualify.

**Note:** Documents are to be certified with an original stamp, which has a date of certification on it. Three (3) months in case of the certified identity documents, and one (1) year in case of the other documents. The person signing as the Commissioner of Oaths must not have any family relationships with the bidder/s.

**NB: Failure to submit any of the above documents will lead to disqualification.**

## 6.2 STAGE 2

The evaluation of each bid shall be based on criteria as specified. The minimum qualifying score for acceptable functionality will be **70 points** and bids that fail to achieve this minimum qualifying score will be eliminated. Points will be awarded on a sliding scale.

Please see evaluation table below.

ITEM	QUALIFYING CRITERIA FOR SHORT LISTING	MAX. POINTS
1.	Proof of similar projects and references to be provided. <ul style="list-style-type: none"> <li>a. Contactable references x 3 = 15</li> <li>b. Experience in successful running similar projects               <ul style="list-style-type: none"> <li>o 5 years or more = 10</li> <li>o 3 - 4 years = 6</li> <li>o 1 - 2 years = 3</li> </ul> </li> </ul>	25
2.	Project plan for the delivery of the skills programme. <ul style="list-style-type: none"> <li>a. Structure of the programme in terms of the outcomes to be achieved (70/30) = 5</li> <li>b. Method and delivery of skills program = 20</li> <li>c. Method of assessment = 5</li> <li>d. Learner support plan = 5</li> </ul>	35
3.	Profiles/CVs of key staff to be attached. <ul style="list-style-type: none"> <li>a. Project Management structure indicated = 5</li> <li>b. Relevant experience managing similar projects (+5yrs preferred) of experience = 5</li> <li>c. Facilitators (relevant experience facilitating the learning programme) = 10</li> <li>d. Registered Assessors (relevant experience facilitating the learning programme) = 10</li> <li>e. Registered Moderators (relevant experience facilitating the learning programme) = 5</li> </ul>	35
4.	Proof of training resources available and the infrastructural resources of the organization	5
<b>TOTAL</b>		<b>100</b>

## 6.3 STAGE 3

**The APPETD Social and Ethics Committee will evaluate the shortlisted bids. Please take note of the value and scoring point system of your proposed bid.**

**80/20** preference point system shall be applicable in the following bids:

- Price 80
- Preferential points 20
- Completed and Signed Covering letter/ Invitation to Bid - **SBD1**
- Signed budget/pricing schedule. Failure to submit a signed budget/pricing schedule will result in the committee accepting the submitted price as the final bid(s).

#### **7. Bid Conditions**

The APPETD Supply Chain Management Policy will apply:

1. APPETD does not bind itself to appoint a bidder with the highest points.
2. APPETD reserve the right to cancel the bid and not award the bid to any of the bidders.
3. Bids which are late, incomplete, and unsigned will not be accepted.
4. Bidders with a turnover above R 10 million must submit a valid certified B-BBEE Verification Certificate from SANAS Accredited Verification Agency to be eligible for empowerment points.
5. B-BBEE Certificates obtained from Accountants/ Auditors will be accepted.
6. An Exempted Micro Enterprise (EME) is only required to submit an affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming annual turnover of R 10 million or less and level of black ownership to claim points.
7. 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 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.
8. Failure to submit a valid certified B-BBEE Certificate or, in the case of EMEs, an affidavit and the accompanying fully completed and signed Standard Bidding Document (SBD 6.1) will result in the bidder not qualifying for claiming preferential points.
9. Bids submitted are to hold good for a period of 90 days.
10. 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.
11. All bids must first meet the pre-qualification criteria to be considered for evaluation
12. Companies that are in the process of de-registration in the CIPC will not be considered.
13. Service Provider must provide proof of Public Liability Insurance.

#### **6 Submission of bids**

Bid documents must be emailed to [projects@appetd.org.za](mailto:projects@appetd.org.za) by **16h30, Wednesday 21 September 2022.**

**Late submissions will not be considered.**

Approved by:



**Cynthia Reynders: CEO**

Witness:



**Nadia Potgieter: Operations Manager**