

TERMS OF REFERENCE (TOR)

APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO PROVIDE PROJECT MANAGEMENT SERVICES FOR A 36-MONTH PERIOD

No late applications will be accepted

Board members: Mr Thulani Tshefuta (Chairperson) | Ms Christelene Brink | Mr Lewis Nzimande | Ms Gaolape Anastacia Seokolo
Mr Nkojane Nelson Maesela | Mr Patrick Babsy Makhafane | Ms Nolukhanyo Amanda Kelengeshe | Ms Violet Matshidza
Ms Tampane Molefe-Sefanyetso | Mr Patrick Boitumelo Moopelwa | Ms Linda Dlodla | Ms Nelisiwe Nzimande
Ms Nomabandla Silinyana | Mr Marcus Ramakgale

CEO: Ms Bontle Lerumo

1. BACKGROUND

- 1.1 The Public Service Sector Education and Training Authority (PSETA) is established in terms of section 9(1) and (2) of the Skills Development Act 97 of 1998. The Skills Development Act is our enabling legislation and guides PSETA's operations as a sector education and training authority (SETA), as set out in section 10 of the Act. PSETA is classified as a national public entity, under Schedule 3A of the public finance management act 1 of 1999 ("PFMA").
- 1.2 PSETA's overarching strategic imperative is building the skills required for a developmental, capable and ethical state. The scope of coverage includes national and provincial government departments, identified public entities, and national parliament and provincial legislatures. The focus and emphasis of the PSETA is primarily on transversal skills, these being, functions of administration, management, planning legislation, policy administration, monitoring and evaluation and others.
- 1.3 PSETA is currently funded through a vote from the National Treasury through the Department of Higher Education and Training. Unlike other SETAs PSETA does not receive levy income from constituents within the PSETA scope. Due to this limited budget PSETA is not able to adequately respond to the skills development needs for the public service sector.
- 1.4 The National Skills Development Plan (NSDP) articulates that workplace-based learning programmes such as experiential learning, Learnerships and internships are critical to addressing the unemployment crisis within the country.
- 1.5 Thus, PSETA has identified four critical learning programmes for which alternative funding sourcing is required:
 - 1.5.1 Technical and Vocational Education and Training (TVET) Work Integrated Learning (WIL)- programme duration 18 months.
 - 1.5.2 University of Technology (HET) WIL - programme duration 3-6 months.
 - 1.5.3 Learnerships for unemployed youth (rural development, and persons with disabilities)- programme duration 12 months.
 - 1.5.4 Graduate Internships for unemployed youth programme duration 24 months.

2. THE OBJECTIVES OF THE ASSIGNMENT

The objective is to appoint a suitably qualified project management service provider to implement various learning programmes (as indicated above) and to assist with the end-to-end project management of these various skills development initiatives funded through any additional funding granted to PSETA by the National Skills Fund (NSF).

3. SCOPE OF WORK

3.1. TARGET NUMBERS /GEOGRAPHY: The numbers and targeted geographical areas are as follows (The numbers are an estimate and subject to change):

- 3.1.1. TVET WIL: Total of 500 learners in five provinces- Eastern Cape, Northern Cape, Mpumalanga, North West and Limpopo, placed at employers in the public sector.
- 3.1.2. HET WIL: Total of 400 learners in four province - KwaZulu-Natal, Gauteng, Western Cape, and Free State, placed at employers in the public sector.
- 3.1.3. Learnerships: Total of 600 learners in five provinces - the Eastern Cape, Northern Cape, Mpumalanga, Limpopo, KwaZulu-Natal and North-West, placed at employers in the public sector.
- 3.1.4. Internships: Total of 200 learners, placed at national, provincial government and Public entities.

3.2. The project management service provider is expected to assist PSETA with the following:

3.2.1. Develop a detailed project plan of how the appointed Project management service provider will implement and maintain the project for the agreed period of time.

3.2.2. Appoint suitably qualified accredited skills development providers (for learnerships) to deliver on the programmes.

3.2.3. Co-ordinate and manage skills development interventions implemented by PSETA strategic partners, such as, the Offices of Premier

in each province, the National Youth Development Agency, the Department of Public Service and Administration and other PSETA strategic partners championing the Public Service competencies.

3.2.4. Recruit learners for the learning programmes in line with PSETA policy and processes.

3.2.5. Develop an Implementation Plan and Project Budget Forecast aligned to the Funding Agreement and Payment Schedule.

3.2.6. Monitor the projects in line with the PSETA policies and prepare detailed progress reports as required.

3.2.7. Ensure learners are registered on the PSETA Management Information System (MIS) or relevant SETA in line with the requirements of the SETA Learning Programmes policy and processes.

3.2.8. Facilitate payment of learner stipends, training costs, project management fees, etc, working with the PSETA Finance department.

3.2.9. Ensure projects are closed out in accordance with the PSETA's project management requirements.

3.2.10. The guidelines on learner stipends and training costs should be aligned to the 2024/25 PSETA DG policy and Criteria, guidelines and the funding framework.

3.2.11. The successful service provider will be expected to facilitate skills transfer to PSETA's project management team.

4. DELIVERABLES

4.1. Initiation

- a. During this phase the service provider will prepare an Inception Report confirming their understanding of the scope of work, methodology, timelines and budget. This report should be submitted within a month after signing contract.
- b. The service provider will be expected to provide a detailed description of how the appointed Project management team will maintain this project for the agreed period of time.
- c. Propose an Implementation Protocol between the Project Management Company and PSETA with distinct roles and responsibilities for the respective Parties.

4.2. Planning

- a. The service provider must provide multiple methodologies for how the identified learning interventions will be implemented to achieve the PSETA mandate.

4.3. Implementation

- a. Upon the signing of the contract, the service provider must submit a plan for implementation of the learning programmes in line with the PSETA Learning programmes policy and processes which includes but not limited to the following:
 - i. Appointment of suitably qualified accredited skills development providers (for learnerships) to deliver on the programmes.
 - ii. Identification of host workplaces.
 - iii. Recruitment and placement of learners for the learning programmes
 - iv. Implementation Plan and Project Budget Forecast aligned to the Funding Agreement and Payment Schedule.
 - v. Monitoring for each project.
 - vi. Registration, reporting and exiting of learners from each project.
 - vii. Payment of learner stipends, training costs, project management fees, etc,
 - viii. Projects close out and reporting.

4.4. Project Reporting

- a. The service provider will be required to submit reporting on each stage of the project to the PSETA in timeframes and format prescribed by the PSETA.
- b. Any reporting required by institutions granting funding.
- c. All records should be maintained by the service provider with due consideration of the POPI Act and PSETA POPI Policy. All records will be handed over to PSETA as and when required.

5. COMPETENCY AND EXPERTISE REQUIREMENTS

The Service Provider should meet the following requirements:

- 5.1. The service provider must be a Project Management Company with demonstrable experience in submitting applications for funding and managing Skills Development projects.
- 5.2. An excellent and proven track record as a project management company.
- 5.3. Registration with the relevant project management professional body (e.g. PMI, PMSA, and etc)
- 5.4. Sound understanding of skills development legislation, SETA mandate and processes and PFMA requirements, compliance and reporting and treatment of additional/donor funding in terms of the PFMA.

6. COSTING

- 6.1. The project management fee must be calculated based on the scope e of work outlined in section 3 and the 2024/25 PSETA DG Policy and Criteria, Guidelines and Funding Framework..
- 6.2. All monetary values quoted must be in South African Rand and must include Value Added Tax (VAT).

7. TIMELINES OF THE APPOINTMENT

- 7.1. Successful service providers will be required to enter a formal contract with PSETA for a 36-month period from the date of the contract award.

8. EVALUATION PROCESS

- 8.1. The evaluation process will comprise of the following phases:
 - a. Phase 1: Mandatory Evaluation
 - b. Phase 2: Functionality Evaluation
 - c. Phase 3: Site Visit and Compulsory Presentation
 - d. Phase 4: Pricing and specific goals

8.2. Phase 1: Mandatory Requirements

The service providers should submit of the following:

- a. Audited financial statements

- b. ISO 21500 : 2021
- c. Bidder must provide valid proof of Professional Indemnity Insurance.
- d. Registration with the relevant project management professional body (e.g. PMI, PMSA, and etc)

8.3. Phase 2: Functionality Evaluation

Bids must meet the minimum eligibility criteria in respect of functionality of 60 points out of 80 points that will be awarded for functionality before they are considered further. Any bid that does not meet the minimum eligibility threshold will be automatically disqualified. The functionality criteria together with the maximum points to be awarded are set out below.

Domain	Evaluation Guide	Criteria	Weight
1. Experience and Capacity: Company profile and overall company experience	1) Company profile indicating years of work experience in project managing skills development projects. 2) Provide the current organogram of the organization and years of experience of each employee.	<ul style="list-style-type: none"> • 1= Company profile with less than 3 years' experience of offering the services. • 2= Company profile, with 3-5 years of experience • 3= Company profile, with 6-8 years of experience • 4= Company profile, with 9-12 years of experience, • 5= Company profile, with above 12 years, 	10
2. Qualification and experience of core team (CVs)	Relevant experience of the project manager and the project team to be deployed to PSETA. Bidder must provide the CV's of the Project management resources	<ul style="list-style-type: none"> • 1= No submission of Proof of registration, CV and/ or certified copies of qualifications and less than 7 years experience of the project manager. • 2= Proof of registration, CV, Certified copies of 	20

Domain	Evaluation Guide	Criteria	Weight
	<p>reflecting capability and track record with number of years, in providing project management services, and have extensive experience in the project management field.</p> <p>Bidder must provide a minimum of three (3) resources with evidence of valid registration with project management professional body and valid qualification or certification with at least one of the following:</p> <ul style="list-style-type: none"> • Proof of valid of certification with at least one of but not limited to the following; • Project Management Professional (PMP) or • Certified Project Management Practitioner (CPMP) or • PRINCE2 Foundation or PRINCE 2 Practitioner or • PMBOK, Professional in Project Management (PPM) or • Certified Project Manager (CPM) Certified Associate in Project Management (CAPM) or 	<p>qualifications and 7 years' experience of the project manager.</p> <ul style="list-style-type: none"> • 3 = Proof of registration, CV, Certified copies of qualifications and 8-10 years' experience of the project manager. • 4 = Proof of registration, CV, Certified copies of qualifications 11-12 years' experience of the project manager. • 5 = Proof of registration, CV, Certified copies of qualifications and 13 years and above experience of the project manager. 	

Domain	Evaluation Guide	Criteria	Weight
	<ul style="list-style-type: none"> • Associates in Project Management (APM) or • Master's in project management (MPM) or • BTEC in Project Management. 		
<p>3. Methodology and Proposed project execution plan</p>	<p>Bidder must demonstrate a thorough understanding of the assignment in line with the scope of work and deliverables outlined in sections 3 and 4 above. Methodology and project execution plan to cover</p> <ul style="list-style-type: none"> • Plan to deliver and implement on the project including timelines, • Resources to the task or role, • Support required to this project. • Implementation Protocol between the Project Management Company and PSETA • Reporting requirements reflecting the objectives measurable, milestone linked to the deliverables. • Monitoring and evaluation plan. • Risk Management plan 	<ul style="list-style-type: none"> • 1 = Methodology not addressing requirements • 2 = Methodology addressing a few requirements • 3 = Methodology addressing most requirements but not adequately. • 4 = Methodology addressing all requirements but not in depth • 5 = Excellent detailed methodology with all requirements thoroughly addressed 	<p>35</p>

Domain	Evaluation Guide	Criteria	Weight
	<ul style="list-style-type: none"> Project Management Tool Activity based costing 		
4. References Traceable references of clients where projects of similar nature were conducted.	Reference letters as evidence of previous work done conducted. (NB: <i>The Reference Letter(s) must be in the letterhead of the previously serviced organisation and should reflect at least name of the organisation, nature of the project, year implemented, duration of the project contactable reference name and contact details</i>) Reference letters must be on a letterhead, signed by the CEO/Head and dated. Note that due diligence will be conducted against reference letters submitted.	<ul style="list-style-type: none"> 1 = One reference letter provided of work previously done. 2 = Two reference letters where the bidder has performed project management functions 3 = Three reference letters where the bidder has performed project management functions 4 = Four reference letters where the bidder performed project management functions. 5 = Five Reference letters where bidder performed project management functions 	15
Total			80

8.4. Phase 3: Site Visit and Compulsory Presentation

- Only bidders who scored 60 and above on functionality during the proposal evaluation (Phase 2), will be subjected to this phase of evaluation. Presentation will be scored out of 20 points.
- Bidders must score a minimum of 10 points on presentation. Bidders must score a minimum of 70 points combined (functionality and presentation) to be considered for the next phase (Price and specific goals).

- c. Presentation: The short-listed bidders shall be expected to provide a compulsory presentation to the PSETA team on the project management tool and on how they will manage the implementation of the project. The bidder might be asked to clarify issues or questions that might arise during evaluation. Each presentation shall be for maximum 30 minutes.
- d. Site Visit: PSETA Team will conduct site visit at the premises of the service providers.
- e. Shortlisted service providers will be expected to submit at least one example of a closeout report. The report example should be included in the presentation.

Phase 3: Presentation

Domain	Evaluation Guide	Criteria	Weight
Presentation	Bidder must present: <ul style="list-style-type: none"> • The project management tool the produce business intelligence reports, and • The implementation plan 	Project management tool and implementation plan	20
Total			20

8.5 Phase 4: price and specific goals

Phase 1: Functionality Evaluation		
Phase 2: Preferential Point System	Points allocated for specific goals	Points
Price		80
Special goals		20

Black owned company	8	
Women	4	
Youth	5	
Disability	3	
Total		100

- a. The bids will be evaluated on 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goals.
- b. The applicant with the highest total number of points will be awarded the contract.

9. FORMAT OF THE BID SUBMISSION

9.1. Technical Proposal

- 9.1.1 Bidders must submit 2 copies of the proposal and one original.
- 9.1.2 Letter of application
- 9.1.3 Company Profile.
- 9.1.4 Team member names and roles and proof of registration with relevant professional bodies, and certified copies of qualifications, and CVs.
- 9.1.5 Proposal with detailed Methodology and Proposed project execution plan to cover the scope of work and deliverables outlined in sections 3 and 4.
- 9.1.6 Reference letters
- 9.1.7 Submission of all applicable documents as indicated below:
- 9.1.8 Valid SARS Tax Compliance Status (TCS) verification/pin or Proof of exemption from SARS
- 9.1.9 Certified copies of the director's ID's document.
- 9.1.10 Copy of the registration document of the organization (CIPC), and

9.1.11 BBBEE certificate or affidavit.

9.1.12 The completed and signed Standard Bidding documents (SBD)

- SBD 1
- SBD 4
- SBD 6.1
- 2024/25 PSETA DG Policy and Criteria, Guidelines and Funding Framework
- General Conditions of Contract (each page must be signed)
- Proof of registration with the National Treasury Central Supplier Database. (CSD) A CSD Registration report with all information verified.

NB: Failure to submit documents requested in section 9.1.12 will disqualify the proposal

10. IMPORTANT INFORMATION FOR BID

Bid applications must be submitted to:

Ms Ursula Mathonsi

Manager: Supply Chain Management

The PSETA

Ground Floor, Woodpecker Building, 177 Dyer Rd,

Hillcrest Office Park, Lynwood

Pretoria

No late applications will be accepted.

The validity periods of the bids is 90 days from the closing date. Please direct all queries to Ms. Ursula Mathonsi via email on ursulam@pseta.org.za or telephonically on 012-423 5700