

THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY

TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE PSETA'S BOARD STRATEGIC PLANNING SESSION AND REVIEW STRATEGIC PLANNING DOCUMENTS

RFP/2021/001423

CLOSING DATE: 29 MAY 2026

CLOSING TIME: 11:00

Bontle
Lerumo

Digitally signed
by Bontle Lerumo
Date: 2026.05.13
19:54:04 +02'00'

1. INTRODUCTION

- 1.1 The Public Service Sector Education and Training Authority (PSETA) is a Sector Education and Training Authority (SETA) established in terms of section 9(1) of the Skills Development Act 97 of 1998 as amended, and is classified as a National Public Entity under schedule 3A of the Public Finance Management Act, 1 of 1999.
- 1.2 The PSETA requires the services of a competent and experienced service provider to facilitate a strategic planning session for the PSETA Accounting Authority (Board) and provide strategic review support for the PSETA Strategic Plan and Annual Performance Plan.

2. SCOPE OF WORK

- 2.1. The PSETA requires the services of a competent and experienced service provider to facilitate a strategic planning session for the PSETA Accounting Authority (Board) and provide strategic review support for the PSETA Strategic Plan and Annual Performance Plan.
- 2.2. The appointed service provider will be required to:
 - Review existing strategic planning documents, including the Strategic Plan and Annual Performance Plan.
 - Conduct a consultation with the Chief Executive Officer to plan the workshop programme.
 - Compile a workshop programme including objectives, facilitation methodology and expected outcomes.
 - Facilitate a strategic planning session over two (2) days for the PSETA Accounting Authority (Board) using an interactive and outcomes-based facilitation approach.
 - Compile a comprehensive strategic planning report outlining key discussions, strategic priorities, resolutions and proposed management actions.
 - Provide strategic advisory support in the refinement and alignment of the Strategic Plan and Annual Performance Plan.
 - Ensure that the strategic documents are SMART and aligned with the DPME Framework for Strategic Plans and Annual Performance Plans.

3. TIMELINES OF THE APPOINTMENT

- 3.1. The project timelines and deliverable dates will be finalised upon appointment; however, the assignment is expected to be completed within a period agreed upon between both parties.

4. PRICING

- 4.1. Detailed costing aligned to the deliverables should be submitted. The proposed project costs must be all-inclusive.
- 4.2. The PSETA reserves the right to negotiate the selection/prioritization of deliverables in line with the contract price.

5. COSTING

- 5.1. A cost analysis must be given to cover the full project amount. The proposed project pricing must be all-inclusive (i.e. including professional fees, venue hire, travel expenses, disbursements and VAT). The PSETA may require a breakdown of rates on any of the items priced and service providers are required to provide same. PSETA reserves the right to negotiate the price.

6. PROPOSAL EVALUATION AND APPOINTMENT OF SERVICE PROVIDER

- 6.1. The proposals will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goals once the minimum functionality criteria are met. The evaluation will be based on:
- 6.2. The evaluation will be based on:

		Points
Price		80
Special goals		20
Black owned company Bidder who has 51% to 100% black people ownership	8	
Women Bidder who has 51% to 100% women ownership	4	
Youth Bidder who has 51% to 100% youth ownership	5	
Disability Bidder who has 51% to 100% disability ownership	3	
Total		100

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

7. FORMAT OF THE BID SUBMISSION

- 7.1. Proposals must be submitted electronically.
- 7.2. Submission of all applicable documents as indicated below:
 - Company profile/proposal indicating the ability and capacity to fulfil all areas as per the scope of work.
 - Certified copy of the doctor's certification with the medical practice number.
 - Certified copies of the director's ID document (in order to claim points for disability as per SBD 6.1)
 - Certified copy of BB-BEE certificate or sworn affidavit
 - Valid Tax compliance status (TCS) PIN or proof of exemption from SARS;
 - Copy of the registration document of the organisation (CIPC)
 - Copy of the Central Supplier Database registration.

8. IMPORTANT MANDATORY INFORMATION FOR BIDDERS

All Standard Bidding Documents (SBD) must be completed and signed.

- SBD 1 (All sections must be fully completed)
- SBD 4 (All sections must be fully completed)
- SBD 6.1 (All sections must be fully completed)
- Proof of registration on the Central Supplier Database.
- General Conditions of Contract (All pages must be signed or initialled)
- The service provider must submit at least a minimum of three (3) contactable reference letters.

NB: Please note that failure to submit documents requested in section 8 will render the proposal disqualified. The tender is valid for 90 days from the closing date.

Bid applications must be submitted to:

Ms Lungile Mokoena email on lungilem@pseta.org.za . Please direct all queries to **Ms**

Lungile Mokoena via email on lungilem@pseta.org.za