



**TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER FOR THE  
DEVELOPMENT OF EISA'S, EXEMPLARS AND RPL TOOLKITS**

**WRSCM-2023/2024-0008**

## **1. BACKGROUND TO W&RSETA**

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) was established in 2000 in terms of the Skills Development Act (as amended). The public entity aims to facilitate the skills development needs of the Wholesale and Retail (W&R) sector through the implementation of learning programmes, disbursement of grants and monitoring of education and training as outlined in the National Skills Development Strategy (NSDS).

## **2. OBJECTIVE OF THE TERMS OF REFERENCE**

The objective of the terms is to appoint a single service provider to manage the project for the development External Integrated Summative Assessments (EISA), Exemplars and Recognition of Prior Learning (RPL) Toolkits per occupational qualification as outlined in the scope of services hereto below. This bid is open to both Individuals and Companies as Service Providers.

## **3. SCOPE OF SERVICES**

The Scope of services will be as follows:

- Development of twelve (12) External Integrated Summative Assessment (EISA) with the relevant marking memorandum per occupational qualification listed hereunder:
  - Retail Buyer (SAQA103145, NQF Level 5, 131 Credits)
    - Buyer (SAQA 103222, NQF Level 5, 110 Credits)
    - Planner (SAQA 332301, NQF 5, 53 Credits)
  - Visual Merchandiser (SAQA 99688, NQF Level 4, 30 Credits)
  - Retail Manager General (Retail Store Manager – RSM) (NQF 6)
  - Checkout Operator (SAQA 118728, NQF 2, 35 Credits)
  - Store Person (SAQA 99703, NQF 2, 41 Credits)
  - Dispatching and Receiving Clerk (SAQA 99446, NQF level 3, 34 credits)
    - Part Qualification – Receiving Clerk (SAQA 99446, NQF level 3, 23 credits)
    - Part Qualification – Dispatch Clerk (SAQA 99446, NQF level 3, 20 credits)
  - Service Station Attendant (SAQA ID 99708, NQF level 2, 28 Credits)
  - Sales Assistant (Retail Sales Advisor) (SAQA ID 99669, NQF level 3, 54 Credits)
- Development of two (2) Exemplars with the relevant marking memorandum per occupational qualification listed hereunder
  - Retail Buyer (SAQA103145, NQF Level 5, 131 Credits)

- Buyer (SAQA 103222, NQF Level 5, 110 Credits)
  - Planner (SAQA 332301, NQF 5, 53 Credits)
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  - Part Qualification – Dispatch Clerk (SAQA 99446, NQF level 3, 20 credits)
- Service Station Attendant (SAQA ID 99708, NQF level 2, 28 Credits)
- Sales Assistant (Retail Sales Advisor) (SAQA ID 99669, NQF level 3, 54 Credits)
- Development of a Recognition of Prior Learning Toolkit for the following occupational qualifications:
  - Retail Chain Store Manager (SAQA 103150, NQF Level 5, 106 Credits)
  - Retail Supervisor (SAQA 99573, NQF Level 4, 100 Credits)
  - Retail Buyer (SAQA 103145, NQF Level 5, 131 Credits)
    - Buyer (SAQA 103222, NQF Level 5, 110 Credits)
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- To use tools/templates provided by the W&RSETA when collating the EISA, Exemplars and RPL Tool Kits.
- To provide the W&RSETA with updated formats of the EISA, Exemplars and RPL Tool Kits after the W&RSETA facilitates the review and moderation of the aforementioned documents.
- To provide the W&RSETA with a detailed Examiners report once EISA, Exemplars and RPL Tool Kits are finalised. The template for this report will be provided by the W&RSETA.

## **NOTE:**

The Copyright and Intellectual Property of all EISA and Exemplars remains the property of the W&RSETA, unless otherwise stated. Any usage of the said material should be permitted in writing by the W&RSETA.

## **4. EXPECTED OUTCOMES AND DELIVERABLES**

- Development of twelve (12) External Integrated Summative Assessment (EISA) with the relevant marking memorandums per occupational qualification listed hereunder
  - Retail Buyer (SAQA103145, NQF Level 5, 131 Credits)
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  - Sales Assistant (Retail Sales Advisor) (SAQA ID 99669, NQF level 3, 54 Credits)
- Supply the W&RSETA with signed Examiners reports and invoice for work conducted.
- Ensure that the finalisation of the first submission of the EISA's, Exemplars and RPL Tool Kits are facilitated by 30 May 2024.
- The duration of the contract will be until 31 March 2025 to cater for remediation on the EISA's and Exemplars after moderation is facilitated.

## **5. MONITORING PROGRESS OF SERVICE**

The W&RSETA will monitor and evaluate the progress of the service delivery as per the deliverables outlined in the contract.

## **6. QUALITY ASSURANCE REVIEWS OF THE SERVICE**

The quality of the services will be managed via weekly reports submitted in the W&RSETA prescribed format to the Specialist: QAP by the Service Provider.

Contracted service providers will be required to sign the W&RSETA Code of Conduct as well as a Confidentiality Agreement (In line with the Protection of Personal Information Act 4 of 2013 (POPIA))

## **7. INDEPENDENCE AND OBJECTIVITY OF STAFF**

In carrying out the services, the Service Provider must ensure that they or any of their staff members remain objective in the execution of their duties.

## 8. EVALUATION PROCESS

Minimum Requirements: Compliance Evaluation																			
Evaluation Criteria		Submission Requirements:		Weighting															
Compliance Documentation	<table><tr><th colspan="2">Minimum Requirements</th><th>YES</th><th>NO</th></tr><tr><td rowspan="3">SCM submission Requirements</td><td>Bidder must provide proof of registration on the Central Supplier Database (CSD)</td><td></td><td></td></tr><tr><td>Bidder must complete and provide one hard copy of the Standard Bidding documentation (Administrative compliance documents (SBD 1, 4, 6.1. and GCC) and Technical Proposal</td><td></td><td></td></tr><tr><td>Bidder must provide proof of statements of results on Assessor Qualification from ETDP SETA</td><td></td><td></td></tr></table>			Minimum Requirements		YES	NO	SCM submission Requirements	Bidder must provide proof of registration on the Central Supplier Database (CSD)			Bidder must complete and provide one hard copy of the Standard Bidding documentation (Administrative compliance documents (SBD 1, 4, 6.1. and GCC) and Technical Proposal			Bidder must provide proof of statements of results on Assessor Qualification from ETDP SETA				
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	Note: Failure to complete the SBD Documents and adherence to the Mandatory requirements will render your bid as non-responsive			0 point															

Technical Evaluation: Qualification Development Subject Matter Expert	
Evaluation Criteria	Weighting
1. Experience and Expertise – Project Management	30 points
2. Experience and Expertise – Subject matter experts	30 points
3. Capacity to deliver	20 points
4. Methodology and Approach	20 points
Total	100 points

Bidders who pass through the compliance evaluation will then be assessed for Technical Evaluation which is discussed in detail in the following sections. The minimum threshold to qualify a bidder is 70%. If no bidder scores 70% then the bid will be cancelled the bid and re-advertised.

EVALUATION CRITERIA		SUBMISSION REQUIREMENTS	WEIGHTING	FORM OF EVIDENCE										
<b>1. Experience and Expertise – Project Management</b> <table><tr><th>Value</th><th>Weighting</th></tr><tr><td>0</td><td>0 points</td></tr><tr><td>1</td><td>15 points</td></tr><tr><td>2</td><td>21 points</td></tr><tr><td>3</td><td>30 points</td></tr></table>		Value	Weighting	0	0 points	1	15 points	2	21 points	3	30 points	Bidder must provide the below listed criteria for experience and expertise in project management. <ul style="list-style-type: none"><li>Bidder must demonstrate at least 3 years of company's experience in project management on the development of External Integrated Summative Assessments (EISA).</li><li>The Project Manager must have at least 5 years of experience in development of External Integrated Summative Assessments (EISA).</li></ul>	30 Points	1. Company portfolio with list of completed Project Management Programmes 2. CV of the project Manager.
		Value	Weighting											
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2= (14 points)	Three (3) recommendation or reference letters from previous clients in which development of assessment instrument and external integrated summative assessment instrument services were rendered (10 points)														
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EVALUATION CRITERIA		SUBMISSION REQUIREMENTS	WEIGHTING	FORM OF EVIDENCE										
<b>4. Methodology and Approach</b> <table><tr><th>Value</th><th>Weighting</th></tr><tr><td>0</td><td>0 points</td></tr><tr><td>1</td><td>10 points</td></tr><tr><td>2</td><td>14 points</td></tr><tr><td>3</td><td>20 points</td></tr></table>		Value	Weighting	0	0 points	1	10 points	2	14 points	3	20 points	<ul style="list-style-type: none"><li>The bidder must provide a comprehensive implementation plan as per project requirements.</li><li>The plan must include the implementation objectives, outline of deliverables, task due dates and timeframes, team member roles and responsibilities and managing identified risk within this project. The plan must outline the project methodology and approach in addressing the scope of services.</li><li>The implementation plan must also be in line with the mentioned timeframes of this bid (July 2023 – March 2025) .</li></ul>	20 Points	Project Plan
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EVALUATION CRITERIA	SUBMISSION REQUIREMENTS		WEIGHTING	FORM OF EVIDENCE
		<ul style="list-style-type: none"> <li>• Bidder provided proof of a comprehensive implementation plan, per occupational qualification, (10 points)</li> <li>• The plan must include <b>all</b> of the following aspects: <ul style="list-style-type: none"> <li>○ the implementation objectives, outline of deliverables, task due dates and timeframes, team member roles and responsibilities and risk assessment.</li> </ul> </li> <li>• The plan outlines the methodology and approach in addressing the scope of services.</li> <li>• The implementation plan is in line with the mentioned timeframes of the bid.</li> </ul> <p><i>(Refer the breakdown of the points allocation for the project plan below)</i></p>		

## BREAKDOWN OF THE POINTS ALLOCATION FOR THE METHODOLOGY APPROACH:

PROJECT PLAN ASPECTS	TOTAL POINTS
<b>Company profiles inclusive of: (Total points: 5)</b>	<b>5</b>
1.1 Company background and Experience	2
1.2 References / list of completed projects	2
1.3 Proposed Project Organogram, to present the project team.	1
<b>SECTION 2: PROJECT METHODOLOGIES, APPROACHES &amp; PROJECT PLAN.</b>	
<b>Details of project methodologies and approaches : (Total points: 15)</b>	<b>15</b>
2.1 Methodologies & Approaches, in addressing the scope of services	5
<ul style="list-style-type: none"> <li>○ <b>Comprehensive Project Plan</b> reflecting: <ul style="list-style-type: none"> <li>▪ Project objectives (2 points);</li> <li>▪ Project phases (2 points),</li> <li>▪ Milestones per phase (2 points)</li> <li>▪ Risk Assessment Plan (2 points)</li> <li>▪ Projected timeframes per milestone (Gantt Chart) (2 points)</li> </ul> </li> </ul>	10
<b>TOTAL POINTS</b>	<b>20</b>
<b>% CALCULATION</b>	<b>100</b>

## 9. PREFERENCE POINT SYSTEM

9.1 The following preference point systems are applicable to this invitation to tender:

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

9.1.2 Points for this tender shall be for:

- Price and
- Specific Goals

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

Points for this tender

**80/20**

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

Where

- Ps = Points scored for the price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

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

***(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)***

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



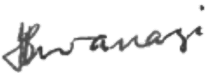
The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)	Form of evidence
<b>SPECIFIC GOAL 1: HDI</b>	<b>15</b>		CIPC document, Valid BBBEE Certificate / Sworn Affidavit / Certified Copy of ID and Shareholder's certificate.
Enterprise is 100% Black Owned	10		
Enterprise is 51% Black Owned	5		
Enterprise is less than 51% Black Owned	3		
Enterprise is 0% Black Owned	0		
100 % Woman ownership	5		
51% Woman ownership	3		
Less than 51% Woman ownership	1		
0 % Woman ownership	0		
<b>SPECIFIC GOAL 2: PROMOTION OF LOCAL ECONOMY &amp; RDP</b>	<b>5</b>		Valid BBBEE Certificate / Sworn Affidavit, Certified
SMMes (EME)	5		
SMMes (QSE)	3		
Large firm (GEN)	1		

## 10. PRICING SCHEDULE

- The bid will be awarded on rates. The quantities below are for evaluation purposes only.
- Prices shall remain firm for the duration of the project.

DESCRIPTION	ESTIMATED QUANTITY	RATE (EXCL VAT)	AMOUNT (EXCL VAT)
Rate for review per qualification	6		
Rate for the development per qualification	6		
TOTAL			R
VAT @ 15%			R
<b>ESTIMATED GRAND TOTAL</b>			<b>R</b>

## 11. APPROVALS

<b>Reviewed and Recommended By:</b>				
<b>Name</b>	Mr. Mzamo Matyobeni			
<b>Position</b>	BSC Chairperson			
<b>Signature</b>		<b>Date</b>	16/02/2024	
<b>Recommendation:</b>				
<b>Recommended:</b>	<input checked="" type="checkbox"/>	<b>Not Recommended:</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Manager's Full Name</b>	Ms. Lindiwe Nhlapo			
<b>Position</b>	Chief Financial Officer			
<b>Notes</b>				
<b>CFO's Signature</b>		<b>Date</b>	22/02/2024	
<b>Approval:</b>				
<b>Approved:</b>	<input checked="" type="checkbox"/>	<b>Not Approved:</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Manager's Full Name</b>	Mr. Tom Mkhwanazi			
<b>Position (Executive)</b>	Chief Executive Officer			
<b>Notes</b>				
<b>CEO's Signature</b>		<b>Date</b>	22/02/2024	