

TERMS OF REFERENCE FOR CONTENT DEVELOPMENT, DESIGN, LAYOUT, PRODUCTION AND PRINTING OF THE ANNUAL REPORT FOR THREE (3) FINANCIAL YEARS (2025/26 TO 2027/28)

1. BACKGROUND TO W&RSETA

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) was established as a legal entity on 20 March 2000 in terms of the Skills Development Act no. 97 of 1998. The W&RSETA's mandate is to facilitate and promote skills development within the Wholesale and Retail (W&R) sector, in line with the National Skills Development Plan (NSDP).

2. PURPOSE OF THE BID

This bid aims to ensure that the W&RSETA (a schedule 3A public entity, which has a legislative responsibility to account annually on its operations and related expenditure to Parliament), presents a high-quality Annual Report to Parliament in compliance with relevant statutory and regulatory requirements.

3. OBJECTIVE OF BID

The objective of this bid is to appoint a suitably qualified and reputable service provider that is highly skilled in strategic content development, compiling, publication, and printing of Annual Reports for public entities. The service provider should be knowledgeable of the SETA environment and will be required to provide an end-to-end development, content, production, printing, and publishing of the W&RSETA annual reports for the three financial years. Essential for the delivery of the service is for the service provider to have the capability, capacity, and expertise in line with the scope of services.

4. SCOPE OF SERVICES

The scope of the services is as follows:

4.1 PROJECT PLANNING AND MANAGEMENT

- Develop and manage a project plan, with key milestones, ensuring that all deliverables align with W&RSETA's requirements and deadlines.
- Assign dedicated project personnel to ensure the development, compilation, design and printing of the annual report.

4.2 CONTENT DEVELOPMENT, COMPILATION AND EDITORIAL

- a) Development of the W&RSETA Annual Report in line with the National Treasury's Annual Report Guide for Schedule 3A and 3C Public Entities. Key activities for the development of the Annual Report include, but are not limited to, the following:
 - Determining the strategic positioning of the Annual Report and aligning it with the guidelines from the National Treasury.

- Conceptualisation of a theme in line with key national strategies as well as W&RSETA annual priorities as outlined in the SP and APP applicable for three (3) financial years.
 - Collect, consolidate and verify departmental submissions from W&RSETA to ensure accuracy, consistency and alignment within the annual report.
 - Develop a comprehensive narrative, including external and internal environment and data analysis, highlights, success stories, and organisational performance in consultation with the W&RSETA team
 - Compilation of the Annual Report by developing content for various sections, drafting content from reports, consolidating submitted information – including charts, graphs, infographics, photography, and financial information to ensure coherence, accuracy, and currency of all information in the Annual Report.
 - Conduct thorough editing and proofreading at every phase of the Annual Report to ensure precise language, professional tone is maintained.
 - In compiling the Annual Report, the appointed service provider shall:
 - Extract and corroborate information from relevant documents and existing reports to create coherent content for the Annual Report
 - Conduct interviews for the compilation of the Chief Executive Officer and Board Chairperson’s reports.
 - Write up executive overviews and forewords based on the interviews, ensuring alignment with the overall narrative of the Annual Report
 - Liaise with W&RSETA management or team members where applicable or required for sourcing and confirmation of information.
- b) Summarise the entire Annual Report to produce an abridged version that provides a high-level summary of key sections of the Annual Report
- c) Produce a presentation of the final product in an editable electronic format

4.3 DESIGN AND LAYOUT (PRODUCTION)

- Provide creative design services to produce an engaging and visually compelling layout for the Annual Report, incorporating dynamic cover concepts that effectively represent W&RSETA’s themes and achievements
- Ensure that the design aligns with W&RSETA's branding guidelines and is accessible to a wide audience
- Integrate visual components such as infographics, charts, and imagery to convey data effectively, ensuring that complex information is easily comprehensible and visually engaging
- Professional design and layout for the full and abridged versions of the Annual Report.
- Produce a maximum of 10 complete sets of proofs (presentation on full colour), including artwork.

4.4 PRINTING

4.4.1 Full Annual Report

- Size: 21cm (width) x 29.5cm (length)
- Estimated number of pages: 120 (including covers)
- Cover: 300 gsm Mongani
- Layout: Portrait

- Text: 135 gsm Mongani
- Paper: Conqueror letterhead
- Finish: Matt with embossed, UV glossed logos and tag line
- Colour: Full colour throughout
- Binding: Perfect
- Quantity: 400 per financial year
- The service provider must apply for SP and ISBN numbers from the Government Printers.

4.4.2 Abridged Version of the Annual Report

- Size: 21cm (width) 21cm (length)
- Estimated number of pages: 60 (including covers)
- Cover: 300 gsm Mongani
- Layout: Landscape
- Text: 135 gsm Mongani
- Paper: Conqueror letterhead
- Finish: Matt with embossed, UV glossed logos and tag line
- Colour: Full colour throughout
- Binding: Perfect
- Quantity: 200 per financial year

4.4.3 Design, Layout, and Interactive Presentation for the AGM

- Annual Report Presentation for the AGM
- PowerPoint Presentation Preparation: Assist in the preparation of a consolidated organisational performance, financial performance, AGSA audit report and strategic plan PowerPoint presentation to be used during the AGM. This includes the development of the copy for the slides and supporting materials summarising key information from the annual report. The PowerPoint presentation should include innovative creative elements, animations, transitions and video that will make the presentation unique and cutting-edge. W&RSETA reserves the right to approve the designer assigned to the development of the AGM presentation.

4.5 PHOTOGRAPHIC SERVICES

Five (5) hour photoshoot sessions per year for individual pictures of the CEO and his Executive Committee; the Management Committee; the Chairperson of the W&RSETA Board, as well as group and individual photographs of the W&RSETA Board members.

4.6 VIDEOGRAPHY

Ten (10) minutes (per year) High Definition (HD) video profiling the summary of the key segments of the Annual Report for uploading on W&RSETA social media platforms. The video will integrate a summarised narrative and selected pictures contained in the Annual Report. The

key component of the production and video flow will require a voice-over artist unpacking the whole narrative. In essence, the video will highlight key performance success areas outlined in the report.

4.7 ELECTRONIC COPIES (Full and Abridged)

High resolution, PDF format, including Flip doo and/or the latest application to be transferred on:
Three (3) USB 2.0 flash drives, and
Ten (10) W&RSETA fully branded CDs in line with the cover page of the Annual Report per financial year.

5. DELIVERY

Copies of the printed Annual Reports (Full and Abridged), to be delivered to the W&RSETA Head Office

Note:

- Information contained in the Annual Report remains confidential until submitted to Parliament. The information must not be shared with other parties until the W&RSETA publishes the Annual Report.
- The material supplied to compile the report and the annual report itself is the intellectual property of the W&RSETA. Thus, the intellectual property linked to all such material belongs to the W&RSETA in its entirety.

6. EXPECTED OUTCOMES AND DELIVERABLES

To produce a high-quality standard Annual Report for the W&RSETA, displaying a high level of professionalism, that would promote the W&RSETA image and brand.

The service provider will be expected to:

- Submit a comprehensive proposal detailing the schedule of activities, inclusive of critical dates related to conceptualisation, content development, editorial services, production and printing services, and management of the Annual Report in line with the regulatory framework and the scope of services
- Provide an editable text file of the entire Annual Report (full and abridged), preferably in MS Word, stored on three (3) USB 2.0 flash drives.
- Four hundred (400) copies of the full Annual Report, two hundred (200) copies of an abridged version, and electronic copies as detailed in the scope of services.
- Design and coordinate the entire process of annual report presentation for the AGM

7. DURATION OF SERVICES

The duration of services is over a period of three financial years (2025/26 to 2027/28), from the signing of the SLA date. The contract will cover the duration of three (3) financial years and is renewable annually. The contract will end in March 2029.

8. QUALITY ASSURANCE/ REVIEW OF THE WORK

The quality of the services provided shall be monitored through progress reports to the duly appointed W&RSETA official(s) at agreed timeframes. All work to be undertaken must be approved by the duly appointed official.

The service provider shall ensure that all work conforms to the highest professional standards. Such work may further be subjected to external quality assurance where necessary. Quality management is required in terms of compliance with the W&RSETA's Corporate Identity Manual, high-definition photography, paper, binding, folding, size accuracy and consistency, packaging, quantity, content accuracy, and overall appearance.

9. SUB-CONTRACTING

Bidders may not sub-contract more than 25% of the value of the contract to any other enterprise. A sub-contracting agreement signed by all parties must be submitted. This agreement must explain the roles and responsibilities of all parties.

10. MONITORING PROGRESS OF SERVICE

The W&RSETA shall monitor and evaluate the progress of the delivery of services against the deliverables on an ongoing basis.

11. INDEPENDENCE AND OBJECTIVITY OF STAFF

- The material supplied to compile the annual report and the annual report itself is the intellectual property of the W&RSETA. Thus, the intellectual property linked to all such material belongs to the W&RSETA in its entirety
- In carrying out the services, the service provider must ensure that its staff maintains their objectivity by remaining independent of the activities they execute.

Note:

- Information contained in the Annual Report remains confidential until submitted to Parliament. The Information is therefore confidential and must not be shared with other parties until the W&RSETA publishes the Annual Report.

12. PRICING

- The scope of services required should be referred to for the purpose of compiling the budget for this proposal. A detailed budget breakdown per scope of services should be presented, inclusive of any applicable VAT.
- Quotation for Year 1, Year 2 and Year 3, with escalation included. Below is pricing guide.

Component	Year 1	Year 2	Year 3
Project Planning & Management			
Information Gathering, Content Creation, Data Analysis etc			
Content Development, Compilation & Editorial (editing & proof reading)			
Photographic Services (<i>Rate per hour</i>)			
Videography			
Design & Layout (Full + Abridged)			
AGM Presentation (PowerPoint)			
Printing – Full Annual Report			
Printing – Abridged Annual Report			
Electronic Copies & Media			
Delivery & Packaging			
Resources/ Skills: <ul style="list-style-type: none"> • Project Manager • Copywriter • Copy Editor/Proofreader • Graphic Designer • DTP/Layout Artist (Final artwork etc) • Motion/Presentation Designer (AGM animation & video integration etc) • Photographer • Videographer/Editor 			
TOTAL			
VAT			
GRAND TOTAL (FOR 3 YEARS)			

13. Technical Evaluation

Technical Evaluation:		Weighting
Evaluation Criteria		
1. Capacity to deliver		40 points
2. Experience and Expertise		20 points
3. Methodology and Approach		20 points
4. Implementation Plan		20 points
Total		100 points
Minimum Requirements		
Evaluation Criteria	Technical Threshold 70% Submission Requirements:	Weighting
Compliance Documentation	Minimum Submission Requirements	0 point
	<p>Bidder must complete the prescribed Standard Bidding Documentation.</p> <p>Bidder must be registered on the Central Supplier Database (CSD) and must submit proof of registration.</p> <p>Bidder must submit one (1) hardcopy of the Compliant, i.e., SBD1,3,1, 4,6.1. and GCC) Technical and Price Proposal</p> <p>Sub-contracting Requirements: (Where Applicable)</p> <ul style="list-style-type: none"> In the case the bidder is sub-contracting then a sub-contracting agreement signed by all parties must be submitted. Bidders may not sub-contract more than 25% of the value, therefore the bidder must submit the quotation from the sub-contractor for the W&RSETA to confirm that the sub-contracting threshold is not exceeded. <p>Note: Failure to complete and adhere to the minimum submission requirements will render your bid as non-responsive.</p> <p>The technical threshold for this bid is 70%. Bidders that fail to meet the 70% technical threshold will not be considered for Price and Preference Evaluation.</p>	

Evaluation Criteria		Submission Requirements:	Weighting										
1 a. Capacity to deliver <table border="1"> <thead> <tr> <th>Value</th> <th>Weighting</th> </tr> </thead> <tbody> <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> </tbody> </table>		Value	Weighting	0	0 points	1	10 points	2	14 points	3	20 points	<p>Bidder must submit evidence of detailed CVs of members who will be assigned to the projects, including a CV for Copywriter – who will do content development of the annual report. The person must have a minimum of 3 years' experience in public entity to ensure that they understand the language within the public entity</p> <ul style="list-style-type: none"> CV for Copy Editor - who will edit and proofread content from W&RSETA annual report and ensure that there is a "golden thread" between the reports, i.e. the reports must be consistent in terms of language and writing style. Editing and proofreading must be done by a person with a minimum of three (3) years' editing experience. CV for Graphic Designer with at least five (5) years' experience CV for the Project manager -3 years of experience <p>0= No evidence</p> <p>1= (10) Bidder provided evidence of CVs of Project Team outlining below three (3) years' experience in copywriting and editing and below 5 years of graphic designer.</p> <p>2= (14) Bidder provided evidence of detailed CVs of the Project Team, outlining overall three (3) years' experience in copywriting and editing and 5 years of graphic designer.</p> <p>3= (20) Bidder provided evidence of detailed CVs of the Project Team, outlining more than three (3) years' experience and above in copywriting and editing and more than 5 years and above in graphic design</p>	20 points
Value	Weighting												
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1 b. Capacity to deliver <table border="1"> <thead> <tr> <th>Value</th> <th>Weighting</th> </tr> </thead> <tbody> <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> </tbody> </table>		Value	Weighting	0	0 points	1	10 points	2	14 points	3	20 points	<p>Bidder must submit proof of five (5) reference letters or more of successfully completed projects in the compiling of Annual Reports. Reference letters must not be older than three (3) years.</p> <p>0 = No Evidence</p> <p>1= (10) Bidder provided reference letters less than five (5) of successfully completed projects, e.g., the public entity, private entity, or SETA. The reference letters are not older than three (3) years.</p> <p>2= (14) Bidder provided proof of five (5) reference letters of successfully completed projects, e.g., the public entity, private entity, or SETA. The reference letters are not older than three (3) years.</p> <p>3= (20) Bidder provided proof of more than/ above (5) reference letters of successfully completed projects, e.g., the public entity, private entity, or SETA. The reference letters are not older than three (3) years.</p>	20 points
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<p>2. Experience and Expertise</p> <table border="1" data-bbox="259 1564 422 1932"> <thead> <tr> <th>Value</th> <th>Weighting</th> </tr> </thead> <tbody> <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> </tbody> </table>	Value	Weighting	0	0 points	1	10 points	2	14 points	3	20 points	<p>Bidder must have a minimum of 3 years of experience in developing and producing annual reports and provide a portfolio of evidence (samples) in line with the scope requirements, with proof of resources to deliver the scope. The resources must include the following:</p> <ul style="list-style-type: none"> • Printing company (minimum 3 years' experience of printing annual reports and could be sub-contracted or in-house) • Graphic designer (minimum 5 years and could be sub-contracted or in-house) • Copywriter (minimum 3 years and could be sub-contracted or in-house) • Copyeditor (minimum 3 years and could be sub-contracted or in-house) <p>0= No Evidence</p> <p>1= (10) Bidder provided a portfolio of evidence (less than three (3) samples of previously completed Annual Reports) that were successfully implemented, with proof of resources to deliver the scope</p> <p>2= (14) Bidder provided a portfolio of evidence (three (3) samples of previously completed Annual Reports) that were successfully implemented, with proof of resources to deliver the scope</p> <p>3= (20) Bidder provided portfolio of evidence (more than three (3) samples of previously completed Annual Reports) that were successfully implemented, with proof of resources to deliver the scope</p>	20 points
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<p>3. Methodology and Approach</p> <table border="1" data-bbox="909 1564 1071 1932"> <thead> <tr> <th>Value</th> <th>Weighting</th> </tr> </thead> <tbody> <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> </tbody> </table>	Value	Weighting	0	0 points	1	10 points	2	14 points	3	20 points	<p>Bidder must provide a methodology and approach, demonstrating an understanding of the requirements of the scope of services listed below</p> <ul style="list-style-type: none"> • Content Development, Compilation and Editorial • Design and Layout (Production) of the annual report • Printing of the annual report • Photographic services • Electronic Copies/ Digital Version • Delivery of the annual report • AGM Presentation <p>0= (0) No evidence submitted</p> <p>1= (10) Bidder provided below six (6) of the required scope of services in the Methodology and Approach</p> <p>2= (14) Bidder provided a detailed Methodology and Approach in line with six (6) the required scope of services</p> <p>3= (20) Bidder provided a detailed Methodology and Approach in line with more than six (6) of the listed</p>	20 points
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Evaluation Criteria	Submission Requirements:	Weighting										
<p data-bbox="272 1640 297 1948">4. Implementation Plan</p> <table border="1" data-bbox="329 1566 492 1938"> <thead> <tr> <th data-bbox="334 1566 358 1938">Value</th> <th data-bbox="334 1566 358 1938">Weighting</th> </tr> </thead> <tbody> <tr> <td data-bbox="367 1566 391 1938">0</td> <td data-bbox="367 1566 391 1938">0 points</td> </tr> <tr> <td data-bbox="399 1566 423 1938">1</td> <td data-bbox="399 1566 423 1938">10 points</td> </tr> <tr> <td data-bbox="431 1566 456 1938">2</td> <td data-bbox="431 1566 456 1938">14 points</td> </tr> <tr> <td data-bbox="464 1566 488 1938">3</td> <td data-bbox="464 1566 488 1938">20 points</td> </tr> </tbody> </table>	Value	Weighting	0	0 points	1	10 points	2	14 points	3	20 points	<p data-bbox="272 1224 297 1539">scope of services required</p> <p data-bbox="272 405 297 1539">Bidder must provide a detailed project implementation plan in line with W&RSETA requirements.</p> <ul style="list-style-type: none"> <li data-bbox="367 957 391 1493">a) Project deliverables/ outputs / milestones <li data-bbox="399 285 456 1493">b) Activities that cover the scope requirements as listed above under methodology and requirements criteria <li data-bbox="464 1209 488 1493">c) timeframes/duration <li data-bbox="496 1209 521 1493">d) Resource allocation <li data-bbox="529 1230 553 1493">e) Contingency plan <li data-bbox="561 1167 586 1493">f) Monitoring & Reporting <p data-bbox="610 285 667 1539">0= (0) No evidence submitted or Project Implementation Plan submitted without activities, milestones, timeframes and resources</p> <p data-bbox="708 285 764 1539">1= (10) Bidder provided a Project Implementation Plan outlining activities, milestone, timeframes and resources</p> <p data-bbox="805 285 862 1539">2= (14) Bidder provided a detailed Project Implementation Plan outlining activities, milestones, timeframes, resources and contingency plans</p> <p data-bbox="870 285 927 1539">3= (20) Bidder provided a detailed Project Implementation Plan outlining activities milestones, timeframes, resources, contingency plan and monitoring and reporting</p>	20 points
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