



SOUTH AFRICA

## TENDER BRIEFING NOTES

TENDER IEC/HR-01/2022

### FACILITATION TRAINING SKILLS

30 NOVEMBER 2022

Tender Briefing Panel / IEC Representatives:

- Mr Tinyiko Baloyi – Supply Chain management
- Mr Ndoweni Mukutu – HR and Training
- Ms Adele Pansegrouw - HR and Training

Mr Tinyiko Baloyi welcomed prospective bidders and thanked them for attending the briefing session for the tender.

The tender requirements were addressed and bidders were advised that the tender briefing session was held to promote a better understanding of the critical tender prerequisites and to enhance successful participation in the tenders.

The briefing session was held virtually using the following link:

<https://us02web.zoom.us/j/85402191346?pwd=MkZDYnpRK0k3ZkhVNVVptUFIVWXptdz09>

During the tender briefing, the administrative requirements pertaining to the completion of the tender document as well as the technical aspects in respect of the Facilitation Training Skills was addressed.

#### ADMINISTRATIVE TENDER REQUIREMENTS

Prospective bidders must note the administrative part of the bidding requirements, amongst others, the following:

- Attendance to the briefing was **not** compulsory.
- The closing date and time for the tender is at **11:00 on 13 December 2022**.

- Tender documents must only be submitted at the Electoral Commission's address as specified in the tender document before the closing date and time. Submission of bids elsewhere will result in such bids being set aside.
- The Electoral Commission preferably determines the time of closure by using Telkom's 1026 number – if available at the time of the closure of the tender.
- Once the tender closes, the list of bids received will be recorded.
- The list of bids received will be published on the Electoral Commission's website within 10 days of the tender closing.
- Interested parties are welcome to observe the closure of the tender, should they so wish.
- Primary bid compliance verification is performed prior to the bid evaluation process to determine which bids qualify for consideration and which not. This is done by the Electoral Commission's Supply Chain Management Department and Legal Services. The findings are then reviewed by the Electoral Commission's panel of independent auditors.
- The Electoral Commission's Supply Chain Management Department, user department and Legal Services will attend to the evaluation of bids thereafter.
- Once the bid evaluation committee has considered the bids, proposals are made to the Bid Adjudication Committee (BAC) who, in turn, shall make recommendations to the Chief Electoral Officer (CEO) for consideration and approval on the adjudication of the in consultation with the Executive Committee (EXCO).
- Bids with a value exceeding R5 million including all applicable taxes are approved by the CEO in consultation with the Commission.
- Bids in respect of bidders and their directors/trustees/shareholders that are listed on the national treasury register for tender defaulters or the list of restricted suppliers will be rejected.
- **NO LATE TENDERS**, as whole or in part, will be accepted.

Certain aspects of the tender that should not be overlooked are as follows:

- Bid documentation is available free of charge on the Electoral Commission's website at [www.elections.org.za](http://www.elections.org.za) or [https://votaquotes.elections.org.za/eproc\\_inter/Default.aspx](https://votaquotes.elections.org.za/eproc_inter/Default.aspx) or the National Treasury eTender portal at <http://www.etenders.gov.za/>
- Prospective bidders must ensure that the tender document is downloaded and printed and that it has all the applicable pages. Incomplete bid submissions, i.e. a tender document that lacks pages or failure to submit any returnables (as may be applicable) will be disqualified. Although courtesy copies were made available to prospective bidders it remains their responsibility to ensure that their bid submissions contain all the applicable pages and returnables (if applicable) of the tender document.

- Preferably print the tender document single sided rather than double sided as it eases the bid assessment and evaluation processes.
- When preparing bid submissions (e.g. files containing the completed tender document and all supporting documentation) it is advisable NOT to split the tender document into different sections as this often leads to incomplete bid submissions in that certain pages of the tender document are omitted or that bidders fail to sign certain pages of the tender document. It is best to include the complete tender document at the top of the file followed by supporting documents.
- Prospective service providers are requested to write their company name on the cover page of the tender document – refer space provided for that purpose.
- The General Questionnaire provided on page twenty-five (25) of the tender is important and suppliers should focus on the requirements stipulated in the questionnaire once they have completed the entire tender document and prepared their detailed bid submission since it would assist them to ensure that they adhere to tender rules and comply with requirements.
- *General Tender Conditions* commencing on page five (5) of the tender document must be read carefully before the completion of the tender document.
- **ALL APPLICABLE PAGES OF THE TENDER DOCUMENT MUST BE SIGNED/INITIALLED IN ORIGINAL INK AND RETURNED AS PART OF YOUR BID SUBMISSION.** Failure to return a page (which constitutes an incomplete bid submission) or unsigned/un-initialled page/s of the tender document shall lead to bids being disqualified. It is suggested that more than one person signs/initials the tender document pages to ensure that it is done properly and that no page is skipped.
- **N.B There is a provision at the bottom of each and every page for a signature/initial.**
- **ALL CORRECTIONS AND/OR ALTERATIONS SHOULD BE SIGNED,** failure of which may lead to the disqualification of bid submissions.
- **EACH ALTERATION should have its own signature/initial.**
- **Any changes/alterations to pricing that is not signed/initialled are material and, therefore, not allowed.**
- **THE USE OF CORRECTION FLUID/TAPE TO AMEND/CHANGE PRICING MUST BE AVOIDED.** The tender rules specifically provide that if correction fluid, tapes or any other such method is used to alter pricing it shall lead to the disqualification of a bid submission. Note the caution expressed at the bottom of each page in the tender document in this regard.
- All potential service providers that wish to do business with the Electoral Commission must register on the Central Supplier Database (CSD). In particular, prospective bidders **MUST** register on the CSD prior to submitting their bids. Further detail and guidelines in this regard are available on the Electoral Commission's website as indicated above.

- Please include a printout of your Central Supplier Database (CSD) registration form in your bid submission and state your unique CSD registration number on page fourteen (14) of the tender document as required.
- A bid shall be disqualified if the bidder is not registered on the Central Supplier Database (CSD).
- National Treasury has placed an obligation on the Electoral Commission to ensure that persons conducting business with it are tax compliant.
  - Your entity's tax compliance status is indicated in the Central Supplier Database (CSD). The Electoral Commission will only contract service providers whose tax status is compliant. This means that if you were tax compliant during the bidding phase but become non-compliant before the bid adjudication is completed, your bid will be disqualified if your tax affairs remains non-compliant as per the provisions of *National Treasury Instruction No 9 of 2017/2018 Tax Compliance Status Verification*. It remains your responsibility to ensure that your taxes are in order, remain in order and that this is reflected on the CSD. You must also ensure that all sub-contractors (if applicable) are tax compliant.
- If preference points are claimed, an original or certified copy (not a copy of a certified copy) of the valid B-BBEE status level certificate from an accredited verification agency or affidavit, if applicable, must be submitted together with the bid.
- The 80/20 preference point system will be applied in accordance with the formula and applicable points as provided for in the respective status level contributor tables in the Preferential Procurement Regulations, 2017. Failure to submit the required B-BBEE status level certificates or affidavit will lead to a zero (0) status level for non-compliant service providers/contributors and no preference points will be given. Furthermore, it is important that correct information and documentation with regards to B-BBEE is submitted by bidders i.e., the B-BBEE certificate or affidavit must match/correspond with the annual turnover information submitted in the tender document and the annual financial statements. The tick box information in the tender document to be completed and should correspond with the B-BBEE documentation submitted.
  - The thresholds applicable to B-BBEE are as follows:
    - All EMEs are required to submit a B-BBEE EME sworn affidavit or CIPC B-BBEE certificate. This applies to entities with an annual turnover below R10 million.
    - QSEs follow two paths dependent on the percentage black ownership. This applies to entities with an annual turnover above R10 million and below R50 million.

- A QSE with black ownership of 51% or more must submit a B-BBEE QSE sworn affidavit.
- A QSE with black ownership of 50% or less must submit a certified copy of a SANAS accredited B-BBEE status level certificate.
- All entities with an annual turnover above R50 million must submit a certified copy of a SANAS accredited B-BBEE status level certificate.
- Please note that all joint ventures must submit a combined B-BBEE document assessed for the applicable bid.
- The *B-BBEE status level information* on page fifteen (15) of the tender document needs to be completed carefully and accurately. The information is used for purposes prescribed in the Preferential Procurement Policy Framework Act and its Regulations and for the final adjudication of the tender. It is advisable to take note of the latest developments concerning the Preferential Procurement Regulations, 2017 from National Treasury, especially in respect of consortia, joint ventures, *et cetera* and eligibility for preference points.
- The Employment Equity Act (EEA) requirements are also important. Bidders must ensure that correct information is submitted together with the bid. As an example, bidders must not claim to be an EEA designated employer if they are not. It is important for bidders to ascertain the latest developments around the EEA from the Department of Labour and to ensure that they are fully compliant. Enactment of the Employment Equity Amendment Bill is of particular importance as Section 53 of the Act will provide that State contracts may only be issued to employers that have been certified as being in compliance with their obligations under the Act. For that, bidders will be required to obtain a certificate from the Minister of Employment and Labour to certify that they are compliant.
- **Do not RETYPE tender documents or any part thereof.** If there is insufficient space, the pages of the tender document in question may be photocopied and attached to the original document.
- Copies may be made of relevant pages of the tender document. It is suggested that copies of applicable pages of the tender document, for example the pricing schedules, be used as rough drafts and then to submit the original completed document for tendering purposes. Although photocopies of the tender pages could be submitted if necessary, all pages must be completed and signed/initialled in original ink. Photocopied detail and/or signatures/initials will invalidate the bid submission.
- The *Tender Questionnaire* (including all declarations) on pages fourteen to nineteen (14–19) must be completed by the service provider. In the case of a consortium, joint venture, partnership or a subcontractor, the forms should be completed for each and every member in order for the Electoral Commission to be able to determine the necessary information and declarations. Separate forms must be used for each entity – do not combine

information for multiple parties on a single form. Failure to do so may invalidate a bid submission.

- The unique National Treasury Central Supplier Database (CSD) registration number on page fourteen (14) must be stipulated as the Electoral Commission will use this information to draw supplier reports on the CSD to verify information such tax compliance status, banking details, *et cetera*.
- As such, the unique CSD registration number will be used to capture your company details as a vendor to the Electoral Commission in the event that your bid succeeds. The Electoral Commission will draw your registration detail from the CSD and any changes (including banking details) you effect to your registration on the CSD will automatically update your registration as a vendor to the Electoral Commission. Detail provided on invoices issued to the Electoral Commission must correspond to the detail of your company as registered on the CSD. It remains your responsibility to ensure that details are correct to enable the Electoral Commission to effect any payments due to you.
- The *Financial Information* on page eighteen (18) should be completed.
- The *Delivery and Guarantees* section on page nineteen (19) should be completed.
- The *Bidder's Disclosure and Declaration* from page twenty (20) to page twenty-two (23) of the tender document is important and must be completed by the service provider and in the case of a consortium, joint venture or a subcontractor, by each and every member. Failure to do so may invalidate a bid submission. The information provided will *inter alia* be used in order to address possible conflict of interest that may arise.
- In the case of a consortium, joint venture or partnership being formed, relevant documents should be submitted for all parties concerned. This is also applicable to the use of subcontractors where 25% or more of the work is being done by another party. Separate forms must be used for each entity.
- It is important to complete all pricing schedules included in the tender document. Failure to complete any pricing schedule that is required to be completed shall invalidate a bid submission. Where additional information is required, for example detailed costing schedules, such information must be submitted as part of the required written submission (where applicable). The mandatory pricing schedule/s in the tender document must not, however, be substituted by the service provider's own pricing schedule/s as it will lead to disqualification.
- Bidders should note the provisions and evaluation criteria provided on page twenty-three (45) as well as the bid evaluation schedule included at the end of the tender document, with specific reference to matters that will lead to the disqualification of bids received due to non-compliance. Bidders are advised to use the evaluation criteria as a guide and checklist to ensure full compliance with all requirements and that all the necessary information and detail are provided in their written submission.

- A due diligence audit will be performed on a shortlisted bidder in order to confirm details and information, capacity, capability and ability to execute the contract. The due diligence audit process is not aimed at creating any expectations or commitments as it is merely part of the overall bid assessment process. In order to mitigate risks, the Electoral Commission may not consider bidders that do not have the necessary capacity, capability and ability which includes financial liquidity to execute the requirements set out in the tender.
- A contract/service level agreement (SLA) may be entered into.
- The Electoral Commission's payment terms are within thirty (30) days after the receipt of a valid tax invoice, provided that such invoice is not disputed.
- To avoid unnecessary delays in payment, it remains the service provider's responsibility to ensure that their banking details are correct and validated on the Central Supplier Database (CSD). The Electoral Commission will not be liable for interest accrued on overdue accounts where the service provider has not resolved their incorrect banking detail on the CSD.
- The award of the tender will be published in the Tender Bulletin (when available again) and the National Treasury eTender Portal as well as the Electoral Commission's website as may be applicable. Bidders should note the award of the tender as published and that no general notices to unsuccessful bidders will be issued.
- A successful bidder may be required to sign a service level agreement (SLA). In the event that the Electoral Commission fails to negotiate a contract/service level agreement with a bidder their bid may be set aside.

General – Bidders must at all times scrutinise the tender document and bid specifications carefully in order to ensure that they provide all the necessary information in their written responses as well as take care that copies of all relevant documentation that is required is submitted as part of their bid.

Written submissions are critical and must contain all the required and relevant information in order to enable proper evaluation of bids. Failure to ensure that the written proposal is complete may result in the bid not meeting all the requirements stipulated in the bid evaluation criteria. Bids not meeting the requirements will not be acceptable and shall be disqualified.

Only qualifying bids that are acceptable will be subjected to scoring in terms of the provisions of the Preferential Procurement Regulations, 2017 for bid adjudication purposes.

## TECHNICAL REQUIREMENTS

The following points were highlighted by Mr Ndoweni Mukutu in respect of the bid specifications for the Electoral Commission's Facilitation Skills **Training**:

The Electoral Commission is requiring a service provider to conduct Facilitation Skills training to 100 permanent staff members. The service provider must provide the general Education Training and Development (ETD) skills required at NQF level 4 with the opportunity to be trained further on Assessor and Moderator skills.

The target group is based in all the 9 provinces and the training is envisaged to be decentralised into each province or a cluster of provinces. The training rollout will be from January to March 2023

The bidders must prepare and submit written proposals must demonstrate the understanding of the need for services and outline the following:

- a) Project plan outlining inception, implementation and completion (step by step of how the project will unfold) which will include the stipulated deliverables and timeframes.
- b) Training approach as well as methodologies to be used to achieve the desired outcomes.
- c) The capacity to train at least 3 groups in different areas simultaneously.
- d) Facilitators should have post matric qualification, at least NQF level 7, be valid accredited facilitators and have at least five (5) years' experience of conducting Facilitation Training Course.
- e) The assessment and moderation of the participants' POE's, including timeframes and issue certificates of competence to participants.
- f) A clear plan on how participants will be supported throughout the portfolio process.
- g) The names, contacts and addresses of at least three referees who can attest to the performance of the bidder on previous facilitation skills training.
- h) A total cost breakdown of the services to be provided and the prices submitted must be VAT inclusive.

In addition to the written proposals, the Service providers must submit the following:

- a) A 5-day training programme comprised of theoretical training and practical presentation by participants.
- b) Accreditation certificate of the service provider with the SETA as a training provider
- c) Accreditation certificate of the service provider to provide facilitator skills training
- d) Facilitator's accreditation certificates to conduct the training.



- e) CVs, certificates (NQF 7 and above) and accreditation of at least three (3) facilitators who will facilitate the programme.
- f) Provide actual training programme indicating unit standards to be covered.
- g) Submit a sample of guidelines for the compilation of portfolio of evidence (POE).
- h) Submit a sample of training close-out report from a previous project conducted.
- i) Submit details; including names, contacts and addresses of three referees attesting that the bidder has provided facilitation skills in their institutions before.
- j) Submit a sample of progress report with regard to attendance as well as POE compilation.
- k) Provide a sample copy of training materials that the bidder used in the previous facilitation training project.
- l) Complete and submit the pricing schedule to indicate their pricing.
- m) All stated prices must include VAT.

Evaluation of the proposals will be conducted as follows:

***Stage 1: Assessment of Bidder's disclosure***

At this stage, all bids received will be assessed in respect of the mandatory information provided in the bidder's disclosure (SBD4) and must comply with the following:

- a) The bid must be registered with the central supplier database (CSD).
- b) The bid must be tax compliant
- c) The bidder is not an employee of the state
- d) The bidder is not a tender defaulter or restricted supplier

***Stage 2: Technical Specification***

Bids received will be evaluated for compliance with technical specification of this tender. Bids will be evaluated on the provision of all the evaluation requirements outlined on the evaluation criteria. Failure to submit any of the requirement will lead to bid disqualification and the bidder will not be considered for further evaluation in stage 3.

***Stage 3: Functionality***

In this stage, bids who satisfied the requirements of stage 2 will be assessed and scored in terms of the evaluation criteria listed below:

- a) Qualification level of the facilitators
- b) Facilitator's experience in conducting facilitation training
- c) Project Plan
- d) Training approach
- e) Bidders must score a minimum of 75% to qualify for stage 4

**Stage 4: Presentation**

At this stage, only bidders who qualified and obtained 75% on stage 3 will be invited for a presentation to the evaluation panel wherein they will be required to demonstrate and showcase their understanding of the scope of work, systems, methodologies, approach and services. Bidders must score a minimum of 75% to qualify for stage 5.

**Stage 5: PPPFA Scoring**

Bidders who achieved the minimum required score of 75% on stage 4 will be scored in terms of the provisions of Preferential Procurement Regulations, 2017 (PPPFA). Here some of the bidders' documentation such as BBBEE credentials, pricing, etc. will determine the scoring. The bidder who scored highest on PPPFA scoring will be appointed subject to due diligence audit requirements and successful negotiation of a service level agreement (SLA/contract).

**QUESTIONS AND ANSWERS**

An opportunity for questions and answers was provided for.

**Question:** Do we have to complete separate pager for additional costing?

**Response:** Pricing schedule need to be completed in full.

**Question:** What is the meaning of tender closing observation?

**Response:** The simple answer is that service providers are welcome to observe the tender closing processes and ensuring that their submitted bids are accounted for.

**Question:** From page 35 going forward are service providers required to complete the forms?

**Response:** All the pages that required bidder's completion need to be completed in full, in addition bidders are required to sign or initial the bottom of each and every page of the tender document.

**Question:** Will there be a form provided to show that service providers attended tender briefing?

**Response:** The tender briefing is non-compulsory so there is no form to demonstrate attendance of the briefing

**Question:** Page 27 of tender specification on objectives states that you need staff to be trained on ETD skills required at NQF, why are you strict that practitioners must have level 7?

**Response:** NQF level 7 is the minimum academic requirements that the Electoral Commission wants for the facilitator of the course. Should the service provider have facilitators with more than NQF level 7, they are more than welcome to bid using those credentials, its and added advantage for the delivery of the programme.

**Question:** How will service providers receive briefing recording?

**Response:** The briefing notes will be uploaded on the website where the tender document is uploaded.

**Question:** When will the tender evaluation processes be concluded?

**Response:** Stage 1 of the evaluation will commence after closure in December and the final stage is envisaged to be completed in January 2023

**Question:** Is the training strictly required on NQF 4 or we can provide any other level? The ODETDP qualification which is giving career path to Assessor and Moderator is pitched on NQF level 5.

**Response:** The NQF level 4 outlined on the specification is a minimum required level. Should the service provider offer a programme that is pitched at a higher level but able to address the requirements of this tender, such is welcomed

**Question:** Which part of learner material is required to be submitted:

**Response:** A sample of a complete learner guide that is given to participants.

**Question:** Are we free to observe the close of tender?

**Response:** Yes, bidders ate most welcome to come and observe the tender closing procedure

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