MICT SETA Head Office
Supply Chain Management
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|---|---|
| **RFQ NUMBER** | **RFQ/MICT/87/2026** |
| **RFQ DESCRIPTION** | **APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE A TWO-DAY MICT SETA MANAGEMENT WORKSHOP ON THE DEVELOPMENT OF THE MICT SETA THEORY OF CHANGE: ALIGNMENT WITH THE DHET POST-SCHOOL EDUCATION AND TRAINING THEORY OF CHANGE AND THE 2027/28 PLANNING CYCLE** |
| **RFQ ISSUE DATE** | **17 NOVEMBER 2026** |
| **BRIEFING SESSION** | **N/A** |
| **CLOSING DATE & TIME** | **23 NOVEMBER 2026 @ 11:00 AM South African Time, RFQ submitted after the stipulated closing date and time will not be considered.** |
| **LOCATION FOR SUBMISSIONS** | rfqs@mict.org.za |
| **NO: OF DOCUMENTS** | **1 SOFT COPY** |

For queries, please contact rfqs@mict.org.za **before the closing date of this RFQ**.

The MICT SETA requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above.
**Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: _____

NATIONAL TREASURY (CSD) SUPPLIER NUMBER: _____

POSTAL ADDRESS: _____

TELEPHONE NO: _____

E MAIL ADDRESS: _____

CONTACT PERSON: _____

CELL NO: _____

SIGNATURE OF BIDDER: _____

**SUPPLIER REGISTRATION ON CSD**
Prospective suppliers must register on the National Treasury Central Supplier database in terms of National Treasury circular no 4A of 2016/17. The bidder shall register prior submitting a proposal/bid.

## MICT SETA: CHECKLIST INFORMATION

**RETURNABLE DOCUMENTS CHECKLIST**

**Request For Quotation invitation document must be completed, signed and submitted as a whole** by the authorised Company representative. All forms must be properly completed; list below serve as a checklist of your RFQ submission.

(**Tick in the relevant block below**)

| DESCRIPTION | YES | NO |
|---|---|---|
| **CSD** Central Supplier Database (CSD) Registration Report | | |
| Pricing Schedule | | |
| Valid Tax Clearance Certificate (S) and or proof of application endorsed by **SARS** and/or **SARS-issued** verification pin | | |
| **SBD 4 – Bidder's Disclosure** | | |
| **SBD 6.1 - Preferential Procurement Claim Form** | | |
| Certified Copy of director(s) ID(s) not older than (six) 6 months | | |
| CIPC Document | | |
| Shareholding Certificate | | |
| **Bidder's eligibility: Form A** | | |

**Note: This RFQ must be completed by the authorised company representative**

## MICT SETA –QUOTATION CONDITIONS

### 1. QUOTATION CONDITIONS

NOTE: Quotation for the supply of goods or services described in this document are invited in accordance with the provision of Government Procurement: General Conditions of Contract available for download from http://www.treasury.gov.za/divisions/ocpo/sc/GeneralConditions/

a. **MICT SETA** does not bind itself to accept the lowest or any RFQ, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of the RFQ.
b. No RFQ shall be deemed to have been accepted unless and until a formal contract/letter of intent is prepared and executed.

**1.1 MICT SETA** reserves the right to:

a. Not evaluate and award RFQ that do not comply strictly with the requirements of this RFQ.
b. Make a selection solely on the information received in the RFQs and Enter into negotiations with any one or more of the preferred bidder(s) based on the criteria specified in the evaluation of this RFQ.
c. Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders, and no change in the content of the RFQ shall be sought, offered, or permitted.
d. Award a contract to one or more bidder(s).
e. Withdraw the RFQ at any stage
f. Accept a separate RFQ or any RFQ in part or full at its own discretion.
g. Cancel this RFQ or any part thereof at any stage as prescribed in the PPPFA regulation.
h. Select the bidder(s) for further negotiations based on the greatest benefit to MICT SETA and not necessarily on the basis of the lowest costs

### 2. COST OF BIDDING

The bidder shall bear all costs and expenses associated with the preparation and submission of its RFQ or RFQ, and the MICT SETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection processes.

## FORM A: BIDDER'S ELIGIBILITY FORM

| | |
|---|---|
| **Name of Bidder:** | |
| **RFQ Number:** | |

We, the undersigned, offer to provide the required services in accordance with the above Request for quotation and hereby declare that our firm, persons, or its directors, including any JV/Consortium /Association members or subcontractors or suppliers for any part of the contract:

a) is not under procurement prohibition by National Treasury, *from doing business with the public sector,*"

b) have not declared bankruptcy, are not involved in bankruptcy or engaged in corrupt / fraudulent practices, and there is no judgment or pending legal action against them that could impair their operations in the foreseeable future;

c) undertake not to engage in prescribed practices, including but not limited to corruption, fraud, coercion, collusion, obstruction, or any other unethical practice, with the MICT SETA or any other party, and to conduct business in a manner that averts any financial, operational, reputational or other undue risk to the MICT SETA.

d) *We declare that all the information and statements made in this Proposal are true and we accept that any misinterpretation or misrepresentation contained in this RFQ submission may lead to elimination of our RFQ submission.*

Name: _____

Title: _____

Date: _____

Signature: _____

## ANNEXURE A: TERMS OF REFERENCE

**REQUIREMENT DESCRIPTION: APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE A TWO-DAY MICT SETA MANAGEMENT WORKSHOP ON THE DEVELOPMENT OF THE MICT SETA THEORY OF CHANGE: ALIGNMENT WITH THE DHET POST-SCHOOL EDUCATION AND TRAINING THEORY OF CHANGE AND THE 2027/28 PLANNING CYCLE**

### 1. INTRODUCTION

The Media, Information and Communication Technologies Sector Education and Training Authority (MICT SETA) is a public entity established in terms of Section 9(1) of the Skills Development Act (Act No. 97 of 1998). The MICT SETA plays a pivotal role in achieving South Africa's skills development and economic growth within the 5 distinct sub-sectors it operates in, i.e., Advertising, Film and Electronic Media, Electronics, Information Technology, and Telecommunications.

In fulfilling its mandate, the MICT SETA supports the objectives of the National Skills Development Plan (NSDP) 2030 and contributes to broader national priorities, including those outlined in the National Development Plan (NDP) 2030. The MICT SETA serves employers and stakeholders across the Advertising, Film and Electronic Media, Electronics, Information Technology and Telecommunications sub-sectors, with the aim of promoting relevant, inclusive and responsive skills development interventions.

### 2. BACKGROUND

The Department of Planning, Monitoring and Evaluation (DPME) Revised Framework for Strategic Plans and Annual Performance Plans (2020) requires public institutions, including SETAs, to adopt results-based planning that clearly demonstrates how institutional inputs and activities translate into outputs, outcomes and ultimately the intended impact.

The DPME National Guideline for the Assessment of Draft 2025–2030 Strategic Plans and Draft 2026/27 Annual Performance Plans (October 2025) further emphasises the need for institutions to articulate a clear, coherent and credible Theory of Change, with outcome and output indicators demonstrably linked to the institutional results framework.

In assessing the MICT SETA draft 2026/27 Annual Performance Plan, the Department of Higher Education and Training (DHET) identified the need to strengthen the SETA's strategic logic and Theory of Change. Key directives included aligning the SETA's planning logic with the DHET PSET Theory of Change, translating Medium-Term Development Plan (MTDP) priorities into funded programmes and measurable results, and ensuring alignment of outcomes, indicators, targets and milestones across the Strategic Plan (SP), Annual Performance Plan (APP) and Service Level Agreement (SLA). DHET also highlighted the need for appropriate consideration of women, youth, children and persons with disabilities in the design and measurement of interventions.

To prepare for the development and submission of the 2027/28 SP, APP, and SLA, MICT SETA Management intends to convene a two-day workshop to develop an institutional Theory of Change aligned with the DPME framework, DHET directives, and national and sectoral priorities. The SETA therefore seeks to appoint a suitably qualified service provider to facilitate the workshop.

### 3. PURPOSE

The purpose of these Terms of Reference (TOR) is to invite suitable and qualified service providers to facilitate a two-day MICT SETA Management workshop to develop the MICT SETA Theory of Change, in line with the DHET directive and the DPME National Guideline outlined above, and to produce a validated Theory of Change diagram, narrative and supporting results chain that will inform the 2027/28 MICT SETA planning documents.

## 4. OBJECTFIVES

The overall objective of the assignment is to facilitate the development, by MICT SETA Management, of an explicit, coherent and credible Theory of Change that demonstrates how MICT SETA's interventions lead to its intended results and how these results contribute to the DHET PSET Theory of Change and national priorities. The specific objectives are to:

4.1. Facilitate a participatory process through which MICT SETA Management collectively develops and owns the MICT SETA Theory of Change;
4.2. Articulate the MICT SETA results chain (impact, outcomes, outputs, activities and inputs) and the causal pathways, assumptions and risks that link each level;
4.3. Ensure that the MICT SETA Theory of Change explicitly nests within the DHET PSET Theory of Change, showing which DHET first-level outcomes (Access, Quality, Relevance, and Success and Efficiency) and second-level outcomes MICT SETA contributes to, with particular attention to the SETA intermediary role under Relevance;
4.4. Align the Theory of Change with the MTDP 2024–2029 strategic priorities, NSDP 2030 outcomes, the MICT SETA SSP and the outcomes in the MICT SETA SP;
4.5. Reflect equity and transformation (women, youth and persons with disabilities) and the enabling environment as explicit elements of the Theory of Change;
4.6. Test whether existing outcome and output indicators are linked to the Theory of Change, identify gaps, and recommend indicators, including an impact indicator responsive to DHET SLA clause 3.1.9 "conduct tracer and impact evaluation studies inclusive of but not limited to determining employment (including self-employment) absorption rates of unemployed learners completing the SETA's priority occupations"; and
4.7. Produce a results chain in a form that MICT SETA can incorporate directly into the 2027/28 SP, APP and SLA, so that the Theory of Change is visible and appropriately utilised in the planning documents as required by the DPME Guideline.

The appointed service provider must ensure that the final Theory of Change is fully traceable to the DHET directive, meaning that each element of the MICT SETA Theory of Change can be mapped to the DHET PSET Theory of Change and to the relevant planning instruments, and that the mapping is documented.

## 5. SCOPE OF WORK

The appointed service provider must assist MICT SETA Management, through the two-day workshop and the associated preparatory and follow-up work, to develop the MICT SETA Theory of Change. The scope of work includes the following:

5.1. Inception and briefing

- Attend an inception meeting with the Manager: Sector Skills Planning and the Project Coordinator to confirm the approach, workshop dates, participants, logistics and deliverables, and submit a brief inception report and work plan.
- Conduct a briefing session with the MICT SETA delegated personnel to discuss and agree on the approach, the workshop agenda, expected outcomes and any strategic considerations before the workshop.

5.2. Document review

- Review documents relevant to the development of the MICT SETA Theory of Change.
- The document review must produce a short synthesis of the current MICT SETA results logic, including a preliminary mapping of existing outcomes and indicators against the DHET Theory of Change and identification of gaps, to be used as input for the workshop.

5.3. Preparation of facilitation material

- Develop the workshop agenda, methodology and facilitation plan for the two days.
- Prepare facilitation material, including a pre-reading pack, presentation slides, Theory of Change templates and working tools (for example, problem tree, results chain, outcome mapping and assumptions matrix), and submit these to MICT SETA Management for approval at least five (5) working days before the workshop.
- Provide guidance and advice on the matters to be discussed as part of the agenda and the preparatory work, including a brief orientation on Theory of Change concepts so that all participants engage from a common understanding.

5.4. Facilitation of the two-day workshop

- Facilitate a two-day, in-person workshop with MICT SETA Management to develop the MICT SETA Theory of Change in consultation with Management.
- Guide participants through defining the problem statement, the long-term impact, the outcomes at each level, the outputs and key interventions, and the causal pathways, assumptions, risks and enabling conditions.
- Facilitate the alignment of the draft Theory of Change with the DHET PSET Theory of Change, the MTDP, the NSDP and the SSP, including how equity and transformation priorities are reflected.
- Facilitate a measurement session, testing whether current indicators are linked to the Theory of Change and identifying candidate impact and outcome indicators.
- Capture workshop proceedings, decisions and agreed changes in real time.

5.5. Post-workshop consolidation and validation

- Consolidate workshop outputs into a draft Theory of Change diagram and narrative, and circulate them for comment by MICT SETA Management.
- Develop an alignment matrix mapping the MICT SETA Theory of Change to the DHET PSET ToC, MTDP priorities, NSDP outcomes, Strategic Plan outcomes, APP output indicators and SLA targets.
- Provide recommendations on how the Theory of Change should be presented and used in the 2027/28 SP, APP and SLA, including the explanation of planned performance.
- Incorporate MICT SETA comments and finalise all deliverables, and present the final Theory of Change to MICT SETA Management.

5.6. General responsibilities

- Treat all MICT SETA information as confidential and use it only for this assignment.
- Ensure that the lead facilitator approved at appointment facilitates both days of the workshop; any change of key personnel requires prior written approval by MICT SETA.
- Provide all facilitation materials and stationery required for the Theory of Change exercises. MICT SETA will arrange the venue and catering.

**6. DELIVERABLES**

The Theory of Change must be developed collaboratively with MICT SETA Management and is the central purpose of the two-day workshop. The appointed service provider will be required to deliver the following:

6.1. Inception report: Outlining the proposed methodology and facilitation approach, work plan, timelines, stakeholder engagement, workshop arrangements and quality assurance processes.

6.2. Document review and gap analysis: A synthesis of the existing MICT SETA results logic, assessing its alignment with the DHET PSET Theory of Change and identifying gaps to be addressed during the workshop.

6.3. Workshop preparation and facilitation: A facilitation pack comprising the workshop agenda, pre-reading material, PowerPoint presentations, Theory of Change templates and working tools, submitted to MICT SETA for review and approval at least five (5) working days before the workshop. This deliverable also includes the facilitation of the two-day Management workshop and real-time capturing of proceedings, decisions and agreed actions.

6.4. Draft Theory of Change and workshop report: A draft report documenting the facilitation process, key deliberations and recommendations, together with the draft MICT SETA Theory of Change diagram and narrative. The Theory of Change must articulate the intended impact, outcomes, causal pathways, underlying assumptions and risks, and be supported by a results chain illustrating the logical relationship between inputs, activities, outputs, outcomes and impact. The draft report must be submitted within seven (7) working days after the workshop for MICT SETA's review.

6.5. Theory of Change alignment and results framework: An alignment matrix mapping the agreed Theory of Change and results chain against the DHET PSET Theory of Change, MTDP 2024–2029 and NSDP 2030, including alignment with MICT SETA SP outcomes, APP output indicators and SLA targets. The matrix must identify gaps and recommend appropriate outcome and impact indicators, including an impact indicator responsive to clause 3.1.9 of the SLA, with proposed measurement methodologies and data sources.

6.6. Final Theory of Change report and supporting materials: A consolidated final report incorporating MICT SETA Management's comments and inputs, comprising:

6.6.1. An executive summary of approximately two (2) pages.
6.6.2. A full report of no more than twenty (20) pages, including a Theory of Change utilisation note outlining how the approved Theory of Change should inform the SP, APP and SLA.
6.6.3. The final Theory of Change diagram and narrative, results chain, alignment matrix and recommendations.

6.7. The final report must be submitted in electronic format within five (5) working days of receiving consolidated comments from MICT SETA.

6.8. Editable deliverables and presentations: Submission of the final Theory of Change diagram in editable and PDF formats, together with editable versions of the alignment matrix, facilitation materials, working tools and workshop records developed through the assignment, to enable future updates and application in subsequent planning cycles.

6.9. Visual presentation and branding: The final report, Theory of Change diagram and associated materials must incorporate appropriate modern graphical representations and visualisations, comply with MICT SETA branding requirements and be consistent with the structure and logic of the DHET PSET Theory of Change.

**7. PROJECT TIMELINES**

The assignment must be completed within the 2026/27 financial year. The two-day workshop will take place in November 2026, on dates to be confirmed by MICT SETA at the inception meeting. The service provider is required to submit the draft workshop report, ToC diagram and narrative within seven (7) working days after the workshop, and the final deliverables within five (5) working days after receipt of MICT SETA comments.

**8. QUALITY AND REPORTING**

The appointed service provider will report directly to the Manager: Sector Skills Planning, who will provide overall oversight of the assignment and its performance.

The service provider's Lead Facilitator will be responsible for the methodological integrity of the workshop process and the technical quality of the Theory of Change and all related outputs and will work with the Project Manager to address any quality-related matters.

All facilitation materials must be approved by MICT SETA before the workshop, and all deliverables are subject to review and approval by MICT SETA. Deliverables that do not meet the requirements of these Terms of Reference will be returned for revision at no additional cost to MICT SETA.

**9. OWNERSHIP RIGHTS**

MICT SETA shall retain ownership of all outputs developed under this assignment, including the Theory of Change diagram and narrative, results chain, alignment matrix, reports, workshop records, facilitation materials and associated data and documents. The appointed service provider must hand over all final deliverables, editable source files and relevant assignment information to MICT SETA before final payment is made.

The service provider may not sell, publish, reproduce or otherwise use or disclose any assignment outputs without MICT SETA's prior written consent. The service provider retains ownership of its pre-existing generic tools and methodologies but grants MICT SETA a perpetual, royalty-free licence to use any such tools incorporated into the deliverables for its internal purposes. Intellectual property rights arising from publicly financed work shall be managed in accordance with applicable legislation, including the Intellectual Property Rights from Publicly Financed Research and Development Act, 2008 (Act No. 51 of 2008).

## 10. PRICING SCHEDULE

**Name of bidder**_____ **RFQ number:** _____

**Closing date** _____

RFQ shall remain valid for acceptance for a period of **90 days** counted from the closing date.

**Bidders to provide further cost breakdown where necessary under each line item, and sub-total and the overall RFQ price (Total) should be included. The below table is for illustration only**:

| Item | Required Description: APPOINTMENT OF A SERVICE PROVIDER TO FACILITATE A TWO-DAY MICT SETA MANAGEMENT WORKSHOP ON THE DEVELOPMENT OF THE MICT SETA THEORY OF CHANGE: ALIGNMENT WITH THE DHET POST-SCHOOL EDUCATION AND TRAINING THEORY OF CHANGE AND THE 2027/28 PLANNING CYCLE | Quantity | Unit Price | Total Cost (Excl. VAT) |
|---|---|---|---|---|
| 1 | Inception Report and Work Plan, including the CEO Briefing Session and Briefing Note | 1 | R | R |
| 2 | Facilitation Pack (agenda, pre-reading pack, slides, ToC templates and working tools) | 1 | R | R |
| 3 | Facilitation of the Two-Day Management Workshop (Lead Facilitator and Co-Facilitator) | 1 | R | R |
| 4 | Final Workshop Report, Final ToC, ToC Utilisation Note and Close-out Presentation | 1 | R | R |
| | | **Sub-Total** | R | |
| | | **VAT@15%** | R | |
| | | **TOTAL PRICE (INCLUDING VAT)** | R | |

Complete below:

1. Delivery Address: **MICT SETA Head office**
   **Level 3 West wing, Gallagher House**
   **19 Richards Drive, Halfway House**
   **Midrand**

2. Indicate Delivery period after order receipt……
3. Is delivery period fixed? **Yes/No**
4. Is the price(s) fixed? **Yes/No**
5. Is the quote strictly to specification? **Yes/No**

I/We, the undersigned, agree that this bidding price shall remain binding on me/us and open for acceptance for the period stipulated above.

Authorised Company Representative: _____

Capacity under which this quote is signed: _____

Signature: _____

Date: _____

## 11. EVALUATION CRITERIA

MICT SETA complies with the provisions of the Public Finance Management Act, Act No. 1 of 1999 as amended; Treasury Regulations of 2005; the Preferential Procurement Policy Framework Act, Act No. 5 of 2000; Preferential Procurement Regulations of 2022; and the MICT SETA Supply Chain Management (SCM) Policy.

RFQs received will be evaluated on functional evaluation criteria, and price and specific goal.

11.1. **STAGE 1: FUNCTIONAL EVALUATION CRITERIA**

RFQ proposals submitted will be evaluated on technical/ functionality out of a maximum of **100 points.** A threshold of **70** points out of **100 points** has been set.

Only bidders who meet or exceed the qualification threshold on technical/ functionality evaluation of **70 points** will be evaluated further on price and specific goals.

**Note:** All bidders achieving less than the set threshold of **70 points** will not move to the next stage of evaluations.

Assessment of evaluation of the functional/ technical criteria will be based on the table below:

| **FUNCTIONAL CRITERIA** | | |
|---|---|---|
| **Category** | **Description** | **Maximum Points** |
| **Methodology** | The bidder must provide a detailed methodology demonstrating its approach to facilitating the development of the MICT SETA Theory of Change. The methodology should demonstrate an understanding of the Terms of Reference, covering the following elements:<br>1. **Understanding of the assignment:** Demonstrate an understanding of the DPME framework, DHET directives, PSET Theory of Change and the role of SETAs in the skills development system.<br>2. **Pre-workshop preparation:** Explain the proposed document review, assessment of existing strategic results logic, identification of gaps and preparation of workshop materials.<br>3. **Workshop design and facilitation:** Provide a proposed two-day agenda and explain how Management will be engaged in developing the Theory of Change, including the impact, outcomes, causal pathways, assumptions and risks.<br>4. **Results chain and performance alignment:** Explain how the Theory of Change will be translated into a results chain and aligned with the DHET PSET Theory of Change, MTDP, NSDP, SSP, SP, APP and SLA, including the development of appropriate outcome and impact indicators.<br>5. **Post-workshop consolidation:** Explain how the draft Theory of Change, results framework, alignment matrix and final deliverables will be developed, validated and finalised.<br><br>**Points on provision of detailed project implementation methodology will be allocated as follows**:<br>•The bidder submitted a methodology and approach that meets all the five (05) elements = **30 points**<br>•The bidder submitted a methodology and approach that meets only four (04) elements = **20 points**<br>•The bidder submitted a methodology and approach that meets only three (03) elements = **15 points**<br>•The bidder submitted a methodology and approach that meets only two (02) elements = **10 points**<br>•The bidder submitted a methodology and approach that meets only one (01) elements = **05 points**<br>The bidder did not submit a methodology or submitted a methodology that does not meet the minimum requirements = **0 point** | **30** |
| **Previous Experience** | The bidder must submit at least three (3) samples of completed comparable assignments undertaken within the past five (5) years. Acceptable samples | **15** |

| | | |
|---|---|---|
| **(Samples of Similar Work)** | include final workshop reports, Theory of Change products, results frameworks or close-out reports.<br><br>Samples should demonstrate experience in one or more of the following:<br>• Theory of Change development for public sector institutions, SETAs or public entities;<br>• Facilitation of strategic planning or Annual Performance Plan development sessions;<br>• Development of monitoring and evaluation frameworks, results frameworks or performance indicators; and<br>• Results-based planning or evaluation work in the skills development or PSET sector.<br><br>**Drafts or incomplete samples will not be considered.**<br><br>**Points for submission of samples of similar work done will be allocated as follows:**<br>• The bidder submitted 3 comparable assignments of similar scope and complexity = **15 points**<br>• The bidder submitted 2 comparable assignments = **10 points**<br>• The bidder submitted 1 comparable assignment = **05 points**<br>• The bidder did not submit comparable assignments or submitted drafts or incomplete samples = **0 points** | |
| **Reference Letters** | The bidder must have experience in facilitating comparable assignments. The bidder must submit at least **three (03)** contactable reference letters related to the bidder's experience in the successful completion of comparable assignments.<br><br>The reference letters must correspond directly to the samples submitted under the Previous Experience criterion. They should include the project title, scope of work, completion date, and contact details of the client representative for verification purposes.<br><br>**N.B:** The reference letters must be from different bidder's clients, fully signed on the client's letterhead, dated, with contactable details, and project description.<br><br>**Points on provision of reference letters of experience in the successful completion of comparable assignments will be allocated as follows:**<br>• The bidder submitted Three (03) signed contactable reference letters from different clients corresponding to the samples submitted = **15 points**<br>• The bidder submitted Two (02) signed contactable reference letters from different clients corresponding to the samples submitted = **10 points**<br>• The bidder submitted One (01) signed contactable reference letter corresponding to the sample submitted = **05 points**<br>• The bidder did not submit reference letters or submitted reference letters that are not related or no sample submitted = **0 point**<br><br>**Important: In the event of sub-contracting, the bidder must furnish the above reference letters of the main bidder. MICT reserves the right to contact the references.** | **15** |
| **Quality Assurance Plan and Risk Mitigation Measures** | The bidder must submit a Quality Assurance Plan and Risk Mitigation Plan demonstrating how the quality of the facilitation process and deliverables will be managed throughout the assignment. The submission should include:<br>• Quality assurance procedures, including internal review of facilitation materials, accurate capturing of workshop proceedings, and validation of the draft ToC with MICT SETA Management.<br>• Risk identification and mitigation measures addressing potential risks to successful delivery and proposed mitigation strategies.<br><br>**Points for submission of quality assurance and risk mitigation will be allocated as follows:**<br>• The bidder submitted a comprehensive plan addressing both quality assurance and risk mitigation with clear, practical, and project-specific measures = **10 points** | **10** |

| | | |
|---|---|---|
| | • The bidder submitted a comprehensive plan addressing both quality assurance and risk mitigation but lacks sufficient detail in one or more areas = **05 points**<br>• The bidder submitted a plan addressing only one element, or no plan submitted = **0 points** | |
| **Project Team** | The bidder must submit a proposed project team structure, including CVs for all team members who will be involved in the assignment. CVs must demonstrate relevant qualifications, experience, and a proven track record in comparable assignments.<br><br>**Lead Facilitator (15 Points)**<br><br>**Experience of the Lead Facilitator (10 Points)**<br>The bidder's proposed lead facilitator must have at least **ten (10)** years or more of experience in monitoring and evaluation, strategic planning, results-based management or institutional performance management, including demonstrable experience in developing Theories of Change and facilitating strategic sessions with senior management or executive structures.<br><br>**Points on provision of CV of Lead Facilitator highlighting relevant experience will be allocated as follows:**<br>• The bidder submitted CV of the lead facilitator highlighting **(10) years** or more of experience in monitoring and evaluation, strategic planning, results-based management or institutional performance management, including demonstrable experience in developing Theories of Change and facilitating strategic sessions with senior management or executive structures = **10 points**<br>• The bidder submitted CV of the proposed lead facilitator highlighting **nine (09) years** of experience in monitoring and evaluation, strategic planning, results-based management or institutional performance management = **08 points**<br>• The bidder submitted CV of the proposed lead facilitator highlighting **eight (08) years** of experience in monitoring and evaluation, strategic planning, results-based management or institutional performance management = **07 points**<br>• The bidder submitted CV of the proposed lead facilitator highlighting **seven (07) years** of experience in monitoring and evaluation, strategic planning, results-based management or institutional performance management = **05 points**<br>• The bidder submitted CV of the proposed lead facilitator highlighting **six (06) years** of experience in monitoring and evaluation, strategic planning, results-based management or institutional performance management = **03 points**<br>• The bidder submitted CV of the proposed lead facilitator highlighting **five (05) years** of experience in monitoring and evaluation, strategic planning, results-based management or institutional performance management = **02 points**<br>• The bidder did not submit CV of the proposed lead facilitator or submitted CV that do not highlight the relevant experience or less than **five (05)** years of experience = **0 Points**<br><br>**Qualification of the Lead Facilitator (05 Points)**<br>The bidder's proposed lead facilitator must be in possession of a Master's degree or higher qualification in Social Sciences, Business Administration, Development Studies, Monitoring and Evaluation, Public Policy or Administration, Economics or a related field<br><br>**Certified copy(ies) must not be older than six (06) months.**<br><br>**Points for submission of a copy of qualification will be allocated as follows:**<br>The bidder submitted certified copy of a Master's degree or higher qualification in Social Sciences, Business Administration, Development Studies, Monitoring and Evaluation, Public Policy or Administration, Economics or a related field | **30** |

| | | |
|---|---|---|
| | • = **05 points**<br>The bidder did not submit certified copy of qualification or submitted copy of qualification in the related field = **0 point**<br><br>**Co-Facilitator (15 Points)**<br><br>**Experience of the Co-Facilitator (10 Points)**<br>The bidder's proposed lead facilitator must have at least **three (03)** years or more of experience in supporting strategic planning, M&E or Theory of Change workshops, including documenting proceedings and drafting reports.<br><br>**Points on provision of CV of Lead Facilitator highlighting relevant experience will be allocated as follows:**<br>• The bidder submitted CV of the lead facilitator highlighting **(03) years** or more of experience in supporting strategic planning, M&E or Theory of Change workshops, including documenting proceedings and drafting reports = **10 points**<br>• The bidder did not submit CV of the proposed co-facilitator or submitted CV that do not highlight the relevant experience or less than **three (03)** years of experience = **0 Points**<br><br>**Qualification of the Co-Facilitator (05 Points)**<br>The bidder's proposed lead facilitator must be in possession of an honours degree or Post-Graduate Diploma in Social Sciences, Development Studies, Monitoring and Evaluation, Public Policy, Business Administration, Economics or another relevant field.<br><br>**Certified copy(ies) must not be older than six (06) months.**<br><br>**Points for submission of a copy of qualification will be allocated as follows:**<br>• The bidder submitted certified copy of an honours degree or Post-Graduate Diploma in Social Sciences, Development Studies, Monitoring and Evaluation, Public Policy, Business Administration, Economics or another relevant field = **05 points**<br>• The bidder did not submit certified copy of qualification or submitted copy of qualification in the related field = **0 point** | |
| **TOTAL** | | **100** |
| **MINIMUM SCORE** | | **70** |

**N.B: Only bidders who meet the threshold of 70 points out of 100 points on functional criteria will be further evaluated for price & specific goals.**

## 11.2. STAGE 2 PRICE AND SPECIFIC GOALS

Only bidder/s or RFQ submissions that have met the requirements of evaluation criteria will qualify for further evaluation on Price and Specific Goals according to the 80/20 preference point system in terms of the Preferential Procurement Regulations 2022, where 80 points will be for Price and 20 points will be for Specific Goals. RFQ will be awarded to the bidder scoring the highest points.

Specific Goal to be evaluated out of **20 Points**:

| Specific Goal Criteria | Points allocation |
|---|---|
| Enterprises which are at least 51% owned by historically disadvantaged persons. | 10 |
| Enterprises which are at least 51% owned by historically disadvantaged women. | 05 |
| Enterprises which are at least 51% owned by historically disadvantaged youth. | 05 |
| **Total** | **20** |

** Enterprises that are not owned by historically disadvantaged persons will be allocated 0 points.

**Bidder must submit the following documents:**

- CIPC Documents and a valid share certificate (Indicating % shareholding by each director)
- Certified ID Copies of the company's directors as per CIPC documents. **(certified copies must not be older than six (06) months)**

**Failure on the part of a service provider to submit proof or documentation required in terms of this RFQ/Tender (in cases where it a tender) to claim points for specific goals, will be interpreted to mean the preference points for specific goals are not claimed.**

## BIDDER'S DISCLOSURE

### 1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest[1] in the enterprise,
employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

| Full Name | Identity Number | Name of State institution |
|---|---|---|
| | | |
| | | |
| | | |
| | | |

2.1.2. Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:……

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:……

### 3 DECLARATION

I, the undersigned, (name)…… in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

[1] the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium[2] will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

| | |
|---|---|
| ..... | ..... |
| Signature | Date |
| ..... | ..... |
| Position | Name of bidder |

[2] Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

# PREFERENCE PROCUREMENT CLAIM FORM

## PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

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### 1 GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

**1.2 To be completed by the organ of state**

a) The applicable preference point system for this tender is the **80/20** preference point system.

b) the **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
(a) Price; and
(b) Specific Goals.

**1.4 To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

| | POINTS |
|---|---|
| **PRICE** | **80** |
| **SPECIFIC GOALS** | **20** |
| **Total points for Price and SPECIFIC GOALS** | **100** |

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

## 2 DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

*(c)* **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## 3 FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 3.1. POINTS AWARDED FOR PRICE

#### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

**80/20** **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \quad \text{or} \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

**Where:**

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

### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

#### 3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

**80/20** **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \quad \text{or} \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

**Where:**

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

## 4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**
***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) |
|---|---|---|
| Enterprises which are at least 51% owned by historically disadvantaged persons. | 10 | |
| Enterprises which are at least 51% owned by historically disadvantaged women. | 05 | |
| Enterprises which are at least 51% owned by historically disadvantaged youth. | 05 | |

**DECLARATION WITH REGARD TO COMPANY/FIRM**

4.3. Name of company/firm……

4.4. Company registration number: ……..

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies

the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct;
ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;
(b) recover costs, losses, or damages it has incurred or suffered as a result of that person's conduct;
(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
(d) recommend that the tenderer or contractor, its shareholders, and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
(e) forward the matter for criminal prosecution, if deemed necessary.

| | |
|---|---|
| | ……<br>**SIGNATURE(S) OF TENDERER(S)** |
| **SURNAME AND NAME**: | …… |
| **DATE:** | …… |
| **ADDRESS**: | ……<br>……<br>……<br>…… |