TERMS OF REFERENCE

Provision and Management of Professional Programme Contributors for the 2027 Jobs Fund Partner Learning Forum

Programme Identification

Name of Client	The Jobs Fund
Project Reference Number	PN558
Name of Project	Provision and Management of Professional Programme Contributors for the 2027 Jobs Fund Partner Learning Forum
Contracting Authority	Government Technical Advisory Centre (GTAC), National Treasury
Accountable Officer and Budget Manager	Ms. Najwah Allie-Edries
Project Purpose	Provision of professional event contributor services for the Jobs Fund Partner Learning Forum, including the identification, recruitment, contracting, briefing, coordination and management of Masters of Ceremonies (MCs), moderators, facilitators and subject-matter specialists to support the successful delivery of selected Forum sessions and stakeholder engagements.

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1. BACKGROUND INFORMATION

1.1 The Jobs Fund

The President announced the Jobs Fund during the State of the Nation Address on 10 February 2011. The Jobs Fund co-finances innovative public- and private-sector initiatives that contribute significantly to sustainable job creation and inclusive growth. It operates on challenge-fund principles and acts as a catalyst for innovation, investment and new ways of working in the labour market.

The Jobs Fund complements the government's broader employment efforts by supporting effective labour-market interventions and job-creation projects. Its portfolio spans enterprise development, support for work seekers, infrastructure and institutional capacity building.

As of 01 October 2014, the Jobs Fund is administered by the Government Technical Advisory Centre (GTAC) in the National Treasury.

1.2 The 2027 Jobs Fund Partner Learning Forum

The Jobs Fund will host the 2027 Partner Learning Forum as a physical event in the Fourways area of Johannesburg on Monday, 1 February 2027 and Tuesday, 2 February 2027. Approximately 150 to 200 current and post-implementation Jobs Fund Partners, policymakers, funders, corporates, development institutions, researchers and other stakeholders are expected to attend.

The Forum theme is "Ubuntu in Action: Learning Together, Creating Jobs at Scale", supported by the message "Shared Knowledge. Stronger Partnerships. More Jobs". The theme recognises that sustainable job creation depends on coordinated action among government, business, funders, implementing partners and communities.

The programme will combine evidence-led plenary discussions, applied masterclasses, participant impact stories, networking and Partner Recognition Awards. Day 1 will be run as a full-day programme followed by networking. Day 2 will conclude after lunch. The event is in person; livestreaming and hybrid participation fall outside the current scope.

1.3 Need for professional programme contributors

The Jobs Fund requires experienced Masters of Ceremonies (MCs), moderators, facilitators and subject-matter specialists to lead engaging, evidence-based and outcomes-focused discussions aligned to the approved Partner Learning Forum programme. GTAC therefore requires a sourcing and management arrangement to identify and secure suitable

contributors, manage contracting and remuneration, coordinate briefing and preparation activities, and provide suitable replacements where necessary to support the successful delivery of the Forum.

2. PURPOSE

The purpose of these Terms of Reference is to **appoint one service provider** to identify, secure, contract, brief and manage professional Masters of Ceremonies (MCs), moderators, facilitators and subject-matter specialists for the Jobs Fund Partner Learning Forum. **A total of ten (10) contributors will be required across eight (8) contributor categories.** Through the provision of these services, the Jobs Fund aims to ensure the delivery of high-quality, engaging and outcomes-focused sessions that support knowledge-sharing, stakeholder engagement and the overall success of the Forum. Please note that as the programme is not finalised, the required contributors could be fewer than ten (10).

3. OBJECTIVES OF THE SERVICES TO BE PROVIDED

3.1 Objectives

The Jobs Fund requires a single service provider to source, secure and manage contributors for the successful delivery of the Partner Learning Forum. The appointed service provider will serve as the primary point of coordination between GTAC (Jobs Fund) and all approved contributors and must have access to a broad network of experienced Masters of Ceremonies (MCs), moderators, facilitators and subject-matter specialists with expertise relevant to the Forum's thematic areas and programme topics outlined below.

Contributor sourcing and management services will include, but not be limited to, the following:

- Identifying and presenting a minimum of three (3) credible and available contributor options for each category quoted, together with written confirmation of availability, acceptance in principle and itemised pricing;
- Assessing and matching contributors to the objectives, subject matter and intended audience of each session, taking into account their expertise, experience and professional standing;
- Managing the end-to-end contributor engagement process on behalf of GTAC, including contracting, remuneration, briefing, preparation, administration of materials and coordination of attendance; and

- Providing suitable replacement contributors of comparable or higher standing and securing their availability within agreed timeframes should an appointed contributor become unavailable prior to the Forum. The four service categories are discussed in further detail in Table 1 below.

Suitable candidates who have the experience and expertise to speak or moderate on the following topics and themes are required as follows:

i. Building Partnerships That Unlock Jobs Where They Are Needed Most;

ii. Beyond Quick Fixes and Transforming the Employment Ecosystem;

iii. Leading Through the Storm and Finding Opportunity in Chaos;

iv. Share credible lessons on uncertainty, opportunity, organisational rebuilding, change and team mobilisation, linked to institutional performance and enterprise growth;

v. Who Gets to Work and Who Gets Left Behind;

vi. Ethical Leadership and the Foundation for Sustainable Jobs and Inclusive Growth;

vii. Provide complementary business-governance and legal, academic, social-justice or public-governance perspectives on ethics, accountability, institutional integrity, trust and sustainable job creation.

3.1.1 Service categories and role requirements

The service categories and associated role requirements set out below describe the contributor categories required for the Partner Learning Forum, together with the expected experience, expertise and responsibilities applicable to each role.

Table 1

No.	Service category	Estimated-Qty	Role requirement
1.	**Master of Ceremonies for both event days**	1	Guide the programme across both days, open and close proceedings, introduce contributors, manage time and transitions, curate audience questions, support participant stories and awards, synthesise insights and make logistical announcements. Required profile: highly experienced professional MC, broadcaster, business journalist or public facilitator with command of economic, employment, business and public-policy issues. Attendance: Day 1 approximately 08:00–17:15 and Day 2 approximately 08:00–13:00, including briefings and rehearsals.

No.	Service category	Estimated-Qty	Role requirement
2.	**Panel 1 moderator**	1	**Session: Building Partnerships That Unlock Jobs Where They Are Needed Most.** Central question: How can partnerships address the structural and spatial constraints that prevent job creation from reaching the people and places that need it most? Required profile: experienced moderator with strong understanding of economics, job creation, business, government, social development or spatial inequality. Indicative timing: Day 1, 11:15–12:15.
3.	**Systems thinking masterclass facilitator**	1	**Session: Beyond Quick Fixes and Transforming the Employment Ecosystem.** Design and facilitate an interactive one-hour masterclass that equips partners to identify root causes, leverage points and collaborative interventions. Required profile: Experienced systems-thinking practitioner, facilitator, organisational-change specialist or sustainability and transition expert. Indicative timing: Day 1, 14:30–15:30.
4.	**Day 1 leadership session moderator**	1	**Session: Leading Through the Storm and Finding Opportunity in Chaos**. Facilitate a focused fireside conversation on resilient leadership, institutional performance and economic opportunity. Required profile: accomplished and experienced moderator, broadcaster, journalist or business facilitator experienced with senior leaders. Indicative timing: Day 1, 15:55–16:55.
5.	**Day 1 leadership subject-matter specialist**	2	**Share credible lessons on uncertainty, opportunity, organisational rebuilding, change and team mobilisation, linked to institutional performance and enterprise growth.** Required profile: recognised business leader, entrepreneur, turnaround strategist, author, economic commentator or high-performance leader. Indicative timing: Day 1, 15:55–16:55.
6.	**Day 2 inclusion panel moderator**	1	**Session: Who Gets to Work and Who Gets Left Behind?** Examine who remains unable to access employment and what employers, government and civil society must change. Required profile: experienced moderator with knowledge of labour markets, inequality, youth employment, disability, social policy, business or civil society. Indicative timing: Day 2, 09:20–10:20.

No.	Service category	Estimated-Qty	Role requirement
7.	**Ethical leadership session moderator**	1	**Session: Ethical Leadership and the Foundation for Sustainable Jobs and Inclusive Growth**. Frame ethical and institutional issues, facilitate a rigorous discussion and draw out implications for Jobs Fund partners. Required profile: experienced public commentator, journalist, academic or professional moderator with knowledge of governance, political economy, accountability, ethics and public trust. Indicative timing: Day 2, 11:20–12:20.
8.	**Ethical leadership subject-matter specialists**	2	**Provide complementary business-governance and legal, academic, social-justice or public-governance perspectives on ethics, accountability, institutional integrity, trust and sustainable job creation.** Both specialists must be credible public voices able to translate principles into practical implications. Indicative timing: Day 2, 11:20–12:20.
	Total Estimated Number of Contributors Required	**10**	

3.1.2 Common contributor requirements

All proposed contributors must meet the following minimum requirements:

i. Demonstrate sufficient professional standing, experience and credibility to engage effectively with an audience comprising senior government, business, development finance and other stakeholder representatives;

ii. Be available to participate in at least one (1) structured Jobs Fund briefing session prior to the Forum;

iii. Undertake adequate preparation for the approved role, session objectives and discussion topics;

iv. Submit any presentations, discussion guides, worksheets, videos or other supporting materials **at least ten (10) working days prior to the event, unless otherwise agreed by GTAC;**

v. Arrive at the venue at the communicated time and remain available for all assigned preparation activities, rehearsals and session obligations;

vi. Consent to reasonable event photography, videography and recording, as well as the non-commercial use of such content in Jobs Fund and GTAC communications, reporting and knowledge-sharing products, subject to agreed terms; and

vii. Conduct themselves in a professional manner at all times, adhere to programme schedules and participate in a manner free from unauthorised promotional, commercial or political activities.

4. SCOPE OF THE SERVICES TO BE PROVIDED

The service provider will act as a strategic partner to the Jobs Fund in the sourcing, contracting and management of contributors for the Partner Learning Forum. The appointed service provider will identify, secure, brief, and coordinate Masters of Ceremonies (MCs), moderators, facilitators, and subject-matter specialists, ensuring suitably qualified contributors are available and prepared to support the successful delivery of the Forum programme.

The tasks to be performed will be detailed in specific work assignments issued as Instructions to Perform Work (IPWs) to the appointed service provider.

5. REQUIRED EXPERTISE AND EXPERIENCE

5.1 Experience

The service provider shall have a demonstrable track record of at **least five (5) years** in providing speaker management, talent sourcing, facilitator procurement, event contributor coordination or related event management services within the South African context. The service provider must have experience in identifying, securing and managing Masters of Ceremonies (MCs), moderators, facilitators, keynote speakers and subject-matter specialists for conferences, stakeholder engagements, learning events, public dialogues or similar professional forums.

The service provider must demonstrate experience in contributor sourcing and coordination, including availability management, contract administration, briefing support, remuneration management and contingency planning to ensure uninterrupted delivery of events.

Experience in supporting government, development finance institutions, donor-funded programmes, public sector entities, industry forums or high-level stakeholder engagements will be considered an advantage.

Further details are set out in the Evaluation Criteria section.

5.2 Team Skills and Experience

The service provider shall provide key personnel (the team) who will be directly involved in delivering the services described in section 3 (three). The proposed team shall consist of a minimum of one (1) and a maximum of two (2) suitably qualified resources and must include a designated Team Leader responsible for overall contributor sourcing, coordination, quality assurance, stakeholder engagement and the timely delivery of all required outputs.

All proposed team members must possess the relevant qualifications, skills and demonstrable experience necessary to undertake the required services and must be available for the duration of the engagement. The expertise and experience of each resource assigned to the project must be clearly reflected in the prescribed CV template.

The bidder shall demonstrate that the proposed team structure is adequately resourced to deliver the full scope of services contemplated in these Terms of Reference. Where a single resource is proposed, the bidder must clearly demonstrate that the individual's qualifications, experience and capacity are sufficient to deliver all aspects of the assignment, including contributor sourcing, contracting, coordination, briefing, remuneration management and contingency planning. Where two (2) resources are proposed, the bidder must clearly indicate how responsibilities will be allocated to ensure effective service delivery throughout the engagement. The service provider shall designate a Team Leader from the proposed team.

Proposed Team Leader – Contributor Management and Stakeholder Coordination – Demonstrable experience in sourcing, securing and managing professional contributors for conferences, stakeholder engagements and similar events. The individual must have proven experience coordinating contributor engagements, managing timelines, overseeing stakeholder requirements, and ensuring the successful delivery of event programmes through effective planning, contracting, briefing and quality assurance. The individual must further demonstrate access to an extensive professional network and contributor database, with the ability to identify, assess, secure and manage a diverse range of high-quality contributors, including keynote speakers, moderators, facilitators, panelists and subject-matter specialists across multiple sectors and disciplines.

Contributor Sourcing and Coordination Specialist – Proven experience in identifying, securing and coordinating Masters of Ceremonies (MCs), moderators, facilitators, speakers and subject-matter specialists. The individual should have experience in contributor liaison, availability management, contract administration, briefing coordination, remuneration management and contingency planning, including the sourcing of suitable replacement contributors where required. The individual must also demonstrate access to a broad and active network of professional contributors, supported by a well-maintained database or talent pipeline, enabling the efficient identification, assessment and mobilisation of suitable contributors across a range of sectors, disciplines and event formats.

5.3 Additional Requirements

The following will also be required from the team:

- The team must maintain regular communication with GTAC and all approved contributors and respond timeously to contributor-related requirements, including programme changes, briefing activities and contributor availability issues.
- The team must ensure that all contributors are appropriately briefed, prepared and available to fulfil their assigned roles and responsibilities during the Forum.
- The team must coordinate the timely submission of contributor biographies, presentations, discussion guides and any other required supporting materials.
- The team must manage all contributor schedules, attendance arrangements and stakeholder engagements necessary for the successful delivery of assigned sessions.
- The team must implement appropriate contingency measures, including the identification and management of suitable replacement contributors, to mitigate risks arising from contributor withdrawals, scheduling conflicts or non-availability.

7. KEY ITEMS FOR NOTING

i. The number of contributors required is indicative and may be adjusted by GTAC based on the final approved programme. The service provider will only be compensated for contributors formally approved and confirmed by GTAC.

ii. Where an approved contributor becomes unavailable, the service provider must identify and secure a suitably qualified replacement of comparable or higher standing, subject to GTAC approval.

iii. An Instructions to Perform Work (IPWs) will be issued for the contributor engagements. The IPW will specify the contributor category, session requirements, minimum experience, deliverables and agreed fees.

iv. Contributors must be available to participate in at least one briefing session with GTAC prior to the Forum and undertake all reasonable preparation necessary for their assigned role.

v. Moderators, facilitators and subject-matter specialists may be required to submit discussion guides, presentations, videos or other supporting materials etc. relevant to their sessions**. Any presentation materials required for the event must be submitted no later than ten (10) working days prior to the event to allow for testing and setup.**

vi. Contributors should be capable of engaging effectively with a diverse audience comprising project implementers, government representatives, academic researchers, industry leaders, business organisations, development practitioners and other stakeholders.

8. REPORTING

The successful service provider will report to the Jobs Fund.

9. LOGISTICS AND SCHEDULE OF THE ASSIGNMENT

9.1 Schedule and Level of Effort

- The appointed service provider will work with the Jobs Fund's Project Manager and other designated officials through Instructions to Perform Work (IPWs) to source, secure, contract, brief and manage contributors for the Partner Learning Forum.
- The IPW will specify the contributor category, role requirements, deliverables, timelines and agreed fees for each engagement.
- The final number of contributors required may vary depending on the approved Forum (event) programme and budget availability. The service provider will only be compensated for contributors approved by GTAC.
- Bidders must submit proposals for all contributor categories and must provide pricing for each category. Proposed pricing must include all costs associated with sourcing, securing, contracting, coordinating and managing contributors, as well as the contributor's fees VAT inclusive.
- The final scope of work and contributor allocations will be confirmed through contracting and the subsequent IPW.

9.2 Geographical Area

The event will take place in the Fourways area of Johannesburg. The appointed supplier must coordinate all contributor booking and event attendance requirements with GTAC and the Event Project Manager.

The bidder must indicate in its financial proposal, for each proposed contributor, whether travel from outside Gauteng will be required. Any travel requirements must be disclosed separately and must not be included in the contributor fees, hourly rates or management fees quoted by the bidder. Where a contributor is required to travel from outside Gauteng to attend the Jobs Fund Partner Learning Forum, the Jobs Fund will arrange and pay for the associated travel

and accommodation costs in accordance with its applicable National Treasury (NT) travel and accommodation policies and procedures.

9.3 Facilities to be Provided by the Service Provider and Jobs Fund

The Jobs Fund will, where necessary, provide access to office facilities for in-person engagements, including meeting space and limited administrative support, as required.

Given that the majority of services will be delivered remotely, the service provider will be responsible for the following:

- IT equipment (including laptops and related software); and
- All mobile and internet communications (voice and data).

9.4 Sub-Contracting

The work the service provider will be contracted to perform shall not be subcontracted.

9.5 Time Frame and Performance

- The service provider will be utilised for a period of three (3) months from the date of appointment.
- Performance will be reviewed by the Jobs Fund during the delivery of the project work.
- Should performance be below the required standard, or should funds not be available, the contract may be terminated before the contract period is completed.

9.6 Assumptions and Risks

The following risks and assumptions should be noted:

- Contributor availability may change at short notice, particularly for high-profile speakers, moderators or subject-matter specialists, which may require the appointment of suitable replacement contributors within constrained timeframes.
- Delays in the confirmation of the Forum programme, session requirements or contributor selections may impact contributor sourcing, contracting, briefing and preparation activities.
- The bidder must disclose availability conditions, cancellation terms, substitution arrangements, exclusivity, travel requirements, technical requirements, payment terms and any dependency that may affect confirmation or performance.
- The successful delivery of contributor services is dependent on the timely participation of contributors and stakeholders, including attendance at briefing sessions, preparation activities and the submission of required presentation materials and supporting content.to event requirements, programme schedules, speaker

participation or delegate numbers may necessitate changes to the event application and associated content within constrained timeframes.

10. BUDGET

The appointed service provider will be issued a comprehensive IPW for the approved contributors. The IPW will specify the contributor category, required expertise, deliverables, timelines and agreed fees.

Bidders must provide, **for each proposed contributor option**, an itemised pricing breakdown comprising:

- the contributor's proposed **hourly rate and estimated number of hours applicable to the engagement;**
- where the bidder does not utilise an hourly rate and instead charges a fixed fee for the contributor's participation in the event, the total fixed contributor fee must be provided (refer to the SBD 3.3 form);
- the bidder's sourcing, contracting and management fee, expressed as a separate amount and as a percentage of the total proposed cost; and
- the total cost proposed for the engagement including contracting and management fees.

GTAC reserves the right to reject any proposed contributor where the proposed fees exceed the available budget or are not considered reasonable in relation to the role, experience and market rates for the contributor category. In such instances, the service provider may be requested to submit alternative contributor options for consideration.

11. PROFESSIONAL & DISBURSEMENT FEES

Bidders must submit a comprehensive pricing proposal covering all costs associated with the delivery of the services contemplated in these Terms of Reference as follows:

- Pricing must include contributor fees, as well as all costs associated with contributor sourcing, contracting, coordination, briefing, management, administration and replacement management where required.
- GTAC will be responsible for approved travel and accommodation arrangements where required. Bidders must clearly indicate, for each proposed contributor, whether

travel and accommodation will be required and the location from which the contributor will travel.

- All costs must be clearly reflected in the prescribed pricing schedule and linked to the relevant contributor category and proposed contributor option.
- No additional costs will be considered unless approved in writing by GTAC prior to being incurred.

12. SUBMISSION REQUIREMENTS

12.1 Resources

i. The service provider shall propose a team comprising a minimum of one (1) and a maximum of two (2) resources to deliver the services contemplated in these Terms of Reference. The proposed team must collectively possess the skills and experience required to source, secure, contract, brief and manage contributors across all contributor categories for which the bidder submits a proposal. Where a team of one (1) resource is proposed, the bidder must clearly demonstrate that the individual has the capacity and experience to deliver the full scope of services. The service provider shall designate a Team Leader from the proposed team.

ii. **The bidder must provide pricing for each contributor category quoted**. Pricing must include all costs associated with contributor sourcing, contracting, coordination, briefing, management and administration, together with the contributor's fees where applicable.

iii. GTAC reserves the right to accept or reject any proposed contributor where the proposed fee exceeds the available budget or is not considered reasonable in relation to the contributor's experience, profile or the requirements of the assignment. In such instances, the service provider may be required to submit alternative contributor options for consideration.

iv. At least two (2) recent contactable references (former or current clients) must be provided.

v. Submission of CVs in the prescribed format is mandatory. A bidder may submit a maximum of two (2) CVs corresponding to the proposed project team. Where more than two (2) CVs are submitted, only the first two (2) CVs in the submission will be considered for evaluation.

12.2 Proposal

Submit one programme-contributor proposal **of no more than fifteen (15) pages**, including the company profile, contributor biographies, CVs/profiles, headshots and supporting annexures. The proposal must present a consolidated response and, at a minimum, include:

- The contributor categories quoted for and the bidder's approach to sourcing, securing, briefing, coordinating, managing and, where necessary, substituting contributors.
- For each contributor category quoted, three (3) proposed contributor options, clearly identifying the preferred option and two (2) alternatives.
- For each proposed contributor, bidders must provide a concise biography, CV or professional profile, recent headshot, role-specific motivation, years and nature of experience, examples of comparable engagements undertaken, and evidence of the contributor's availability and willingness to participate.
- An itemised quotation for each proposed contributor option, indicating the contributor's proposed fee and the basis thereof (e.g. hourly), the bidder's sourcing, contracting and management fee, and the total proposed cost for the engagement.
- Where the bidder does not utilise an hourly rate and instead charges a fixed fee for the contributor's participation in the event, the total fixed contributor fee must be provided, including the bidder's sourcing, contracting and management fee, and the total proposed cost for the engagement. **A summary of all proposed costs must be provided in SBD 3.3.**
- Details of the bidder's relevant experience, proposed project lead and recent client **(2)** references for similar assignments.

12.3 Financial Proposal

The financial proposal must use the provided costing template and include VAT as per SBD 3.3. The financial proposal must include costing for each proposed contributor option, indicating the contributor's proposed fee and the basis thereof (e.g. hourly), the bidder's sourcing, contracting and management fee, and the total proposed cost for the engagement.

Where the bidder does not utilise an hourly rate and instead charges a fixed fee for the contributor's participation in the event, the total fixed contributor fee must be provided (refer to the SBD 3.3 form).

Where a bidder requires a 50% advance payment to secure the booking of programme contributors included in GTAC’s final approved list, the requirement must be disclosed in the SBD 3.3 form.

Any 50% advance payment will be exceptional and subject to GTAC's prior written approval, the approval of the relevant delegated authority, confirmation of the contributor's availability, and receipt of the applicable booking, contracting, cancellation and refund terms. Disclosure of a deposit requirement does not create an automatic entitlement to advance payment.

If a contributor withdraws after an advance payment has been made, the appointed bidder will be responsible for recovering or securing a credit for the amount paid and, at no additional cost to GTAC, proposing and securing an approved replacement of comparable or higher calibre at the same agreed price. Where a suitable replacement cannot be secured, the bidder must refund or credit the relevant advance payment to GTAC without delay.

The remaining 50% of the agreed fee will be payable within 30 days after GTAC receives a valid final invoice after the event, provided that the contributor has delivered the agreed services and GTAC has accepted the performance and supporting documentation.

13. EVALUATION CRITERIA

GTAC has set minimum standards that bidders must meet to be selected as successful bidders. The successful bidder will be awarded the contract for the **above** duration of the service requirements and will be selected based on the following three-phase process:

Instruction to Bidders:

1. Bidders are advised that RFQ proposals must be submitted strictly in accordance with the e-Procurement (online) submission requirements. All required information must be completed and submitted in the designated tabs and fields on the e-Procurement system. This requirement applies to all information and supporting documentation, including Curriculum Vitae (CVs) and all applicable SBD forms.

2. Failure to comply with the requirements of Clause 1 above, as well as the mandatory requirements stipulated in Paragraph 13.1.2 of the Terms of Reference (ToR), will result in the disqualification of the bid.

3. Bidders must upload a duly completed Bidder's Declaration Consent Form for each CV submitted. The form must be attached under the appropriate attachment section of the e-Procurement system. The details of the evaluation phases are outlined below:

13.1 Evaluation Phases/Methodology

Table 2: Evaluation Phases

Evaluation Stage	Description
Phase 1	**Stage 1A: Administrative Compliance – Non-Disqualifying** A bidder is required to submit the administrative compliance documents as referred to in paragraph 13.1.1. **Stage 1B: Mandatory Compliance – Disqualification/ Pre-Qualification** Failure to submit any mandatory documents will result in disqualification. Refer to paragraph 13.1.2.
Phase 2	**Phase 2: Technical Evaluation:** **Stage 2a. Desktop Evaluation** Bidders must submit information in accordance with the Bid Submission Requirements. The submitted CV (in the provided template) must respond to the Evaluation Criteria cited in these Terms of Reference. This will be evaluated out of 100% with a Threshold of 70%. Only bidders who meet the threshold will be considered for Phase 3.
Phase 3	**Price and Specific Goals** Preference points in the 80/20 formula will be awarded to bidders for attaining a score for Specific goals as indicated in Table 6. Bidders must provide the required information for evaluation purposes.

It should be noted that the stages are evaluated as separate processes and in sequence. Only bidders that meet the requirements of one phase proceed to the next, and the scores from the different phases are not combined into a single score.

13.1.1 Stage 1a: Administrative Compliance (Non-Disqualification)

During this phase, bid documents will be reviewed to determine compliance with tax matters and the Central Supplier Database (CSD) at the closing date and time of the bid. Bidders must submit all returnable documents as outlined in Table 3 below using the designated electronic e-procurement system.

Table 3: Bid requirements compilation and submission:

Document to be submitted	Requirement
SBD 1- Invitation to Bid	Complete the supplied pro forma document on the e-procurement system.
Central Supplier Database (CSD) Registration Report, or CSD registration number, or valid Tax Compliance Status.	Bidders must be registered on the Central Database System (CSD) at the closing date and time of the RFQ. NB: The bidder must submit, in the case of a Joint Venture, Consortium, Trust, or Partnership a valid Tax Compliance Status Verification and / or SARS-issued pin code for both companies must be submitted (which will be verified).
SBD 4 - Bidder's Disclosure (Refer to note below)	Complete the supplied pro forma document on the e-procurement system.
Note: Bidders must complete the SBD 4 document as provided on e-procurement. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form: - ''Person'' means a bidder or supplier or shareholder, director, trustee, partner, or member of a bidder or supplier having the controlling interest in the bidder or supplier. - ''State'' means a national or provincial department, a national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament	
SBD 6.1 - Preferential Point Claim form in terms of the Preferential Procurement Regulation (PPR) 2022.	Complete the supplied pro forma document on the e-procurement system, i.e. SBD 6.1 and Specific Goals tab as provided on the e-procurement system. Failure to complete the SBD 6.1 will result in the bidder forfeiting points for specific goals.

Tax Clearance Status

A valid tax PIN / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Where consortium/joint ventures/sub-contractors are involved, each party to the association must submit a separate validation of Tax status and CSD registration number. Bidder's tax matters must be compliant at the time of award. In the case where a bidder's tax matters are non-compliant, a bidder will be given

seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

No tender shall be awarded to a bidder whose tax affairs are not in order.

GTAC reserves the right to withdraw an award made or cancel a contract concluded with a successful bidder in the event that it is established that such bidder was not tax compliant at the time of the award.

GTAC further reserves the right to cancel a contract with a successful bidder if such bidder does not remain tax compliant for the full term of the contract.

**All tax-related matters during the Supply Chain Management Process will be in line with the National Treasury Instruction No.09 of 2017/2018.*

Conducting business with the state

Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered; i.e. if a bidder representative is in the employ of the state, such a bid will not be considered.

- Conducting business means engaging in business, trade, occupation, profession, calling, industry, or undertaking of any kind, or any activity carried on for gain or profit by any person within the Republic or elsewhere.
- An employee includes persons appointed on a temporary or permanent basis and includes interns.
- An employee is regarded as **'conducting business with an organ of state'** when an employee or an employee acting as a director of a private or public company-
    - concludes, or intends to conclude, a written or oral agreement, irrespective of the process followed with an organ of state;
    - such agreement is not associated with that employee's employment with his or her department (i.e. it is not the employee's duty to interact with suppliers on behalf of the department) ; and
    - through such agreement provides goods or services to any organ of state for any personal benefit, financial or otherwise.

13.1.2 Stage 1b: Mandatory Compliance (Disqualification)

Bidders must submit a responsive proposal in accordance with these terms of reference and below the minimum prequalification requirements. Failure to adhere to any of these requirements will result in disqualification:

a. Bidders must be registered on the Central Supplier Database (CSD) on the closing date of the Request for Quotation (RFQ).

b. Submission of a CV in the provided template is required. A bidder is required to submit no more than two (2) CVs. If a bidder submits more than 2 CVs, only the first two CVs in the submission shall be considered for evaluation. The CV must be completed as provided (input data) / indicated on the e-procurement portal.

c. Submission of a price/financial proposal is required as per SBD 3.3, and must be completed as indicated in the e-procurement portal

d. Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the state will not be considered. i.e., in the event that a bidder representative is in the employ of the state, such a bid proposal will not be considered.

13.1.3 Phase 2: Desktop Evaluation

a. Bids will be evaluated strictly in accordance with the bid evaluation criteria stipulated in this ToR.

b. In a case where there is a difference between the contents of this ToR and the e-procurement system, the ToR takes precedence.

c. Proof of Qualifications: Bidders must upload qualification certificates as well as all required certificates. Certified copies will be requested in the event that the bid is successful and before an agreement can be concluded.

d. Please note that a Certificate of Membership shall not be deemed as proof of educational qualification (Education qualifications refer to certifications issued by an institution of higher learning e.g., certificate, diploma, degree, etc.)

e. Non–submission of qualifications will lead to a score of zero for the qualification's evaluation criterion.

f. All international qualifications must be accompanied by South African Qualifications Authority (SAQA) Accreditation.

g. Non–submission of SAQA confirmation will lead to a score of zero for the qualification's evaluation criterion.

h. **Two (2) CVs** will be evaluated per bid. If more than two (2) CVs are submitted per bid, the first two (2) CVs that appear in the bid will be evaluated. The CV must be completed as provided (input data) / indicated on the e-procurement portal.

i. No more than two (2-) persons will be selected to constitute a team for one bidder.

j. GTAC reserves the right to terminate the Agreement/award or temporarily defer the provisioning of the Services, or any part thereof, at any phase with immediate effect on written notice to the Service Provider, should GTAC in its sole and absolute discretion, decide not to proceed with the Services.

The Desktop Evaluation criteria are discussed in Table 4 below.

Table 4: Phase 2 Desktop Evaluation Criteria

	Evaluation Criteria	Scoring Criteria	Weight
1.	**Service Provider -** Demonstrable Track Record		**20**
	Demonstrable track record of at least five (5) years in providing speaker management, talent sourcing, facilitator procurement, contributor coordination or related event management services, including the sourcing, contracting and management of Masters of Ceremonies (MCs), moderators, facilitators, keynote speakers and subject-matter specialists for conferences, stakeholder engagements, learning events and similar forums.	5 = over 9 years of operations 4 = over 8 years of operations 3 = over 7 years of operations 2 = over 6 years of operations 1 = over 5 years of operations 0 = Less than 5 years of operations	
2.	**Team Leader Qualifications & Experience**		**10**
	a) Qualifications		5
	Highest qualification (in Event Management, Communications, Public Relations, Marketing, Business Management, Commerce, Social Sciences, Human Resources, Public Administration, Development Studies) (i) Note: if the qualification is from an institution outside South Africa, bidders must submit the South African Qualifications Authority (SAQA) certificate. (ii) Where qualifications are not submitted, or qualifications are not in the relevant field as mentioned above, or no SAQA certificate is provided (where applicable), the score of 0 will be awarded.	5 = Master's and above (NQF Level 9–10) 4 = Honours Degree/Relevant registration (NQF Level 8) 3 = Degree (NQF Level 7) 2 = National Diploma (NQF Level 6) 1 = Recognised formal certificate (NQF 5) or less 0 = Irrelevant Qualifications or non-submission of certified copy of Qualifications and/or SAQA certificate	
	b) Experience		5
	The Team Leader must have the following skills and experience:	5 = > 10 years combined experience	

	Evaluation Criteria	Scoring Criteria	Weight
	• Demonstrable experience in sourcing, securing and managing professional contributors for conferences, stakeholder engagements and similar events. • Proven ability to manage end-to-end contributor engagements, including sourcing, contracting, briefing, scheduling and delivery. • Experience in stakeholder engagement and coordinating requirements across multiple clients, contributors and event stakeholders. • Strong project management, quality assurance and risk management capabilities, including the management of contributor substitutions and contingency arrangements. • Experience in government, development finance, donor-funded programmes, public sector events or high-level stakeholder engagements will be advantageous. The completed CV template must include a list of all relevant projects or similar assignments, including the role played (Refer to Annexure A – CV Template)	4 = 8 – 10 years combined experience in the specific areas 3 = 5 – 7 years combined experience in the specific areas 2 = 2 – 4 years combined experience in the specific areas 1 = 1-year combined experience in the specific areas 0 = No relevant experience	
3.	**Contributor Sourcing and Coordination Specialist - Qualifications & Experience**		**10**
	a) Qualifications		5
	Highest qualification (in Event Management, Communications, Public Relations, Marketing, Business Management, Commerce, Social Sciences, Human Resources, Public Administration, Development Studies) (i) Note: if the qualification is from an institution outside South Africa, bidders must submit the South African Qualifications Authority (SAQA) certificate.(ii) Where qualifications are not submitted, or qualifications are not in the	5 = Master's and above (NQF Level 9–10) 4 = Honours Degree/Relevant registration (NQF Level 8) 3 = Degree (NQF Level 7) 2 = National Diploma (NQF Level 6) 1 = Recognised formal certificate (NQF 5) or less 0 = Irrelevant Qualifications or non-submission of certified copy of Qualifications and/or SAQA	

	Evaluation Criteria	Scoring Criteria	Weight
	relevant field as mentioned above, or no SAQA certificate is provided (where applicable), the score of 0 will be awarded.	certificate	
	b) Experience		5
	The Contributor Sourcing and Coordination Specialist must have the following skills and experience: • Demonstrable experience in identifying, sourcing and securing Masters of Ceremonies (MCs), moderators, facilitators, speakers and subject-matter specialists for conferences, stakeholder engagements and similar events. • Proven experience in contributor liaison, availability management, scheduling, briefing coordination and stakeholder communication. • Experience in evaluating contributor suitability against programme objectives, audience requirements and session outcomes. • Sound understanding of contributor contracting, administration and remuneration management processes. • Demonstrated ability to manage contributor logistics, preparation activities and contingency arrangements, including the sourcing of suitable replacement contributors where required.	5 = > 10 years combined experience 4 = 8 – 10 years combined experience in the specific areas 3 = 5 – 7 years combined experience in the specific areas 2 = 2 – 4 years combined experience in the specific areas 1 = 1-year combined experience in the specific areas 0 = No relevant experience	
4.	**Proposed Contributors, Suitability and Alignment to Requirements**		**30**
	Evaluation of the suitability of the **proposed contributors submitted for the category(ies) being** quoted, including their relevance, credibility, experience, professional standing and alignment to the session objectives and target audience.	**5 = Excellent** - Proposed contributors demonstrate exceptional experience, credibility and relevance to the category and thematic area, with evidence of similar high-level engagements. **4 = Good** - Proposed contributors demonstrate strong experience and relevance, with good evidence of similar engagements.	

	Evaluation Criteria	Scoring Criteria	Weight
		3 = Average - Proposed contributors meet the minimum requirements and demonstrate suitable experience and relevance. **2 = Below Average** - Proposed contributors partially meet the requirements, with limited evidence of relevance or experience. **1 = Poor** - Proposed contributors demonstrate limited relevant experience and poor alignment to the requirements. **0 = No suitable contributors proposed.**	
5.	**Contributor Network and Replacement Capability**		**10**
	Evaluation of the bidder's contributor network and ability to source suitable alternatives where required.	**5** = Excellent - Extensive and diverse contributor network with strong evidence of sourcing capability and replacement management. **4** = Good - Well-established contributor network with good replacement capability. **3** = Average - Adequate contributor network capable of meeting minimum requirements. **2** = Below Average - Limited contributor network with some gaps in coverage. **1** = Poor - Weak contributor network with limited evidence of suitable alternatives. **0** = No evidence provided.	
6.	**Technical Proposal**		**20**
	Evaluation of the bidder's proposed approach to sourcing, securing, briefing, contracting, managing and coordinating contributors, including stakeholder engagement, communication, contingency planning and quality assurance.	**5** = Excellent - Comprehensive and well-structured proposal that fully addresses all requirements and demonstrates a strong understanding of the assignment. **4 =** Good - Well-developed proposal addressing all requirements with clear and	

	Evaluation Criteria	Scoring Criteria	Weight
		practical methodologies. **3 =** Average - Proposal adequately addresses the requirements and demonstrates a satisfactory understanding of the assignment. **2 =** Below Average - Proposal partially addresses the requirements and contains gaps in the proposed approach. **1 =** Poor - Proposal inadequately addresses the requirements and demonstrates a limited understanding of the assignment. 0 = Non-submission of proposal.	
TOTAL TECHNICAL POINTS			**100 points**
MINIMUM THRESHOLD			**70 points**

Only bidders that meet the 70-points threshold will proceed to Phase 3.

13.1.4 Phase 3: Price and Specific Goals Evaluation

a. The Preferential Procurement Evaluation will be based on the 80/20 principle.
b. The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for the price as allocated in the enclosed form SBD 6.1. which must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in Table 6 below.
c. Submission of a price proposal is required in the proforma format. (SBD 3.3). Bidders need to provide the cost per output, inclusive of VAT.
d. GTAC reserves the right to negotiate the price offer or rates with the recommended bidder(s).
e. GTAC reserves the right to terminate the Agreement/award or temporarily defer the provisioning of the Services, or any part thereof, at any phase with immediate effect on written notice to the Service Provider, should GTAC, in its sole and absolute discretion, decide not to proceed with the Services.

Table 6: Price and Specific Goals Evaluation Criteria

Number of points allocated (80/20 system)	
Price	**80**

Number of points allocated (80/20 system)	
The specific goals allocated points in terms of this tender	**20**
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10
Women's percentage of ownership: 30% and above	10
Total Points	**100**

The CSD report shall be used as evidence to confirm / award points for specific goals. It is the responsibility of the bidding entity to ensure that the information on the CSD is updated.

Table 7: Definitions

Terminology	**Definition**
Black People	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 "Black People" is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation before 27 April 1994; or II on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalisation prior to that date.
"Specific Goals"	means specific goals as contemplated in section 2(1)(d) of the Act, which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability, including the implementation of programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994;
Historically Disadvantaged Individual (HDI)	means a South African citizen: who, due to the apartheid policy that had been in place, had no franchise in national elections prior to the introduction of the Constitution of the Republic of South Africa, 1983 (Act No 110 of 1983) or the Constitution of the

Terminology	Definition
	Republic of South Africa, 1993, (Act No 200 of 1993) ("the interim Constitution); and/or who is a female, and/or who has a disability. provided that a person who obtained South African citizenship on or after the coming into effect of the Interim Constitution is deemed not to be an HDI;

14. FINANCIAL IMPLICATIONS

The service provider may be required to attend meetings at Jobs Fund offices in Pretoria (Gauteng) when deemed necessary by the Jobs Fund.

15. CONTRACTING AUTHORITY

The Contracting Authority will be the Government Technical Advisory Centre (GTAC).

16. OTHER BID CONDITIONS

Prior to the appointment, the recommended bidder(s) will be subjected to a screening/vetting process conducted by the State Security Agency (SSA); as such, they may be required to submit additional supporting documentation.

GTAC reserves the right to negotiate the final offer with the recommended bidder before the award.

17. BID VALIDITY PERIOD

The RFQ will be valid for ninety (90) days from the closing date of the RFQ.

18. LEGAL IMPLICATIONS

The successful service provider must be prepared to enter into a contract with GTAC.

19. CLARIFICATIONS

Requests for clarification must be made in writing by e-mail. Telephonic enquiries for clarification will not be accepted.

Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.

20. COMMUNICATION

GTAC's Professional Services Procurement (PSP) unit will only communicate with bidders by email where bid clarity is sought, to obtain information or to extend the validity period. For any

enquiries, email: psp@gtac.go.za. The submission reference must be included in the subject line of the email. GTAC will only respond to email communication during business hours.

Alternatively, contact the e-procurement portal support desk at:

https://vendorportal.gtac.gov.za/Contact.

Any communication by the bidder (either by facsimile, letter, electronic mail or any other form of correspondence) to any government official, representative, or a person acting in an advisory capacity for GTAC in respect of this bid between the closing date and the award of the bid is prohibited.

21. COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the Information to bid by bidders will result in invalidation of such bids.

22. PROHIBITION OF RESTRICTIVE PRACTICES

In terms of section 4(1) of the Competition Act No. 89 of 1998, as amended, an agreement between, or concerted practice by, firms, or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is/ are or a contractor(s) was/were involved in:

a. Directly or indirectly fixing a purchase or selling price or any other trading condition.
b. Dividing markets by allocating customers, suppliers, territories or specific types of goods or services; or
c. Collusive bidding.
d. If a bidder(s) or contractor(s), in the judgment of the purchaser, has/have engaged in any of the restrictive practices referred to above, the purchaser may, without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered or terminate the contract in whole or in part and refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act No. 89 of 1998.

23. BENEFICIAL OWNERSHIP

The bidder/s are required to provide the information below for transparency.

a. A beneficial owner of a company is an individual who, directly or indirectly, ultimately owns that company or exercises effective control over that company.
b. Companies are required to keep a register of their beneficial owners and to provide this information to the Companies and Intellectual Property Commission (CIPC). The CIPC maintains a central register of beneficial ownership information.

c. The beneficial ownership regime in South Africa is intended to improve transparency and accountability in the corporate sector. It is also intended to help prevent money laundering and terrorist financing.

d. Companies are required to keep a register of their beneficial owners and must disclose in their bids the following information, as provided for in their register for the information of each beneficial owner:

- Name
- Date of birth
- Identity number or passport number
- Residential address
- Occupation
- Nature and extent of control over the company

24. SUBMISSION DETAILS

To respond to this tender, bidders are required to register on the GTAC e-procurement system, using the following link: **https://vendorportal.gtac.gov.za/**

The registration process involves the following steps:

a) Register as a portal user. This is the process of creating a user account on the vendor portal/e-procurement system. This will allow the user to view and respond to tenders.

b) Capture the supplier details. Registering the company details allows the bidder to enter information and upload documents.

To respond to this tender:

c) Log in to the portal https://vendorportal.gtac.gov.za/

d) Navigate to the tender menu.

e) Select “Formal” and click on “Current”.

f) A list of available tenders will be available, and the bidder will select the tender number (e.g. TEN0000000070) to start the submission process.

Detailed instructions on how to register on the e-procurement system are available at (https://docs.corelab.co.za/Home/ViewContent?productid=1&sectionid=2&contentid=1165)

The capturing process is in the form of a wizard, with the system guiding you through each step. Once all the required information is completed, remember to submit your bid. Only submitted bids will be eligible for the award.

NB: Only electronic submission of bids on the GTAC e-procurement system is allowed. Do not submit hard copy bids to GTAC, as these will not be considered.

NB: Submissions received after the closing date and time will not be accepted.

For any enquiries, email: psp@gtac.gov.za or contact the vendor support desk at: https://vendorportal.gtac.gov.za/Contact.

25. NON-COMPULSORY BRIEFING SESSION

No briefing session is required

27. CONTACT DETAILS

Professional Services Procurement,

3rd Floor at GTAC: room GL03.44

Private Bag X 115, Pretoria, 0001

Physical address: GTAC, 40 Madiba Street (Vermeulen), Pretoria, 0001

For any enquiries, email: psp@gtac.gov.za