TERMS OF REFERENCE: APPOINTMENT OF A SERVICE PROVIDER TO RENDER COACHING TO EXCO MEMBERS, SENIOR MANAGERS, AND MIDDLE MANAGERS FOR THE PERIOD OF 24 MONTHS



1. BACKGROUND TO W&RSETA

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) is a public entity listed in Schedule 3A of the PFMA and was established in March 2000. The SETA must, in accordance with any prescribed requirements, perform in accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), any other relevant legislation, and the Constitution. The SETA therefore seeks to appoint a professional and consulting service provider to offer executive coaching for EXCO, Senior managers, and managers for two years.

2. PROJECT OUTCOME

Coaching is a systematic process and not an event. The SETA expects the coaching services to lead to the following outcomes, amongst others:

- Cultivate personal and professional development by creating more opportunities to function more effectively as a leader and in a team.
- At the end of the two years, the attendees must be able to coach and mentor their team members.
- Broaden the awareness and understanding of management in an emerging labour market, a continually transforming, complex, and ambiguity-laden environment.
- Allow participants to apply their learning to identify challenges on how the organization can be taken forward to ensure sustainability.
- Provide a holistic approach to develop leadership mastery - Transformational leadership, Responsiveness, and Collaboration.
- Also able to manage change, uncertainty, and ambiguity.
- Equip participants with the tools and techniques to create a positive and innovative organizational culture in line with the SETA Vision and Mission.

3. SCOPE OF WORK AND SERVICES

Having said that, the SETA has identified a need for one-on-one as well as group coaching and mentoring sessions for Executives, Senior Managers, and Middle Managers, and the total number of these managers is as per the tables below. The objective is to enrich learning and development, to enhance SETA's leadership impact and effectiveness to drive organizational culture and business performance.

The coaching and sessions/services must include the following:

- Determine the coaching plan for each employee and groups based on their strengths, areas of improvement, and identified short, medium, and long-term goals.
- Coaching sessions will consist of One-on-One sessions and group/alignment sessions where required; sessions are to be face-to-face for group sessions and online (virtual) for one-on-one.
- The service provider must conduct initial psychometric assessments and 360-degree assessments to identify the developmental areas on which the coaching will be based, and develop a personalised plan for each individual.

- The implementation of the coaching and mentoring plan through sessions must focus on the specific competencies and areas identified as per each assessment.
- Psychometric Assessments and 360-degree assessments to serve as an input in the individual coaching and mentoring sessions in terms of the personal developmental needs and plan.
- 360-degree assessments to be conducted at the beginning of the programme and at the end of the coaching cycle.
- Executives, Senior and Middle Managers will (need to) receive an individual written report on the outcome of the assessments as well as a personalised individual plan.
- Supply individual written reports on the outcome of the psychometric assessments and the 360-degree assessment to the participant and the SETA HR Unit at the beginning, during, and at the end of the programme.
- Guide & support Executives and Managers in developing personalised development plans which must be linked to their performance agreements.
- Facilitate the process of allocating Coaches to Coaches.
- Quarterly reporting on the progress made regarding the coaching and mentoring outcomes to the SETA HR division.
- Provide a high-level progress report to HR every quarter, or as and when required, including measuring the impact of the coaching and mentoring services; and
- A final close-out report to the SETA HR Unit with recommendations at the end of the coaching and mentoring programme.

4. SPECIFIC DELIVERABLES

- The virtual individual coaching sessions over the period of two years are customised based on the requirements and needs of an individual. The maximum number of coaching & mentoring sessions per person will be six (6) sessions.
- Group session for Executive Managers, Senior Managers & Middle Managers – The group sessions will have a maximum of four (4) sessions per category as per the tables below.
- The mode of delivery for the individual sessions will be a virtual platform, and for the group sessions, it will be face-to-face sessions.

5. PROJECT DURATION

The services are to be rendered as indicated in the tables below for a period of 24 months. **A Service Level Agreement** will be entered into with the successful bidder for the coaching project.

6. QUALITY ASSURANCE- REVIEW OF THE SERVICES

Quality Assurance of the services provided will be in the form of meetings and reporting to the duly appointed W&RSETA official(s) at agreed timeframes.

The service provider shall ensure that all work conforms to the highest professional standards and that the hours billed will be confirmed and signed off by both parties.

7. MONITORING PROGRESS OF WORK

The W&RSETA shall monitor and evaluate the progress of the delivery of services through deliverables stipulated in the Service Level Agreement.

11. Bid Evaluation

This bid will be evaluated using the 80/20 principle. The received bid proposals will be evaluated in three phases to arrive at the final phase of the bid award, and the phases will be as follows:

11.1 Stage 1

COMPLIANCE

In this phase, all bids received will be verified for compliance and completeness of the submitted proposal per the set of mandatory requirements. Bidders who fail to comply with the requirements below may be eliminated, and bidders who comply with the requirements below progress to the next phase of technical evaluation.

11.2 Stage 2

DETAIL TECHNICAL EVALUATION CRITERIA AND POINT ALLOCATION

At this stage, the evaluation of the bid focus will be on the proven experience and technical capabilities of the bidder to deliver the required services. Thus, for this phase, the bidders are required to submit credible supporting documents to be allocated points.

11.3 Stage 3

Price Evaluation

If the bidder is successful and achieves the required threshold of points during the stage 2 evaluation, they will proceed to this stage of price evaluation.

Technical Evaluation: Executive and Management Coaching				
Mandatory Requirements				
Evaluation Criteria	Submission Requirements:			Weighting
Compliance Documentation	**Mandatory Submission Requirements** 1. Bidder must provide proof of a compliant Tax Pin 2. Bidder must provide proof of registration on the Central Supplier Database 3. Bidder must complete and sign the Standard Bidding documentation (SBD) **4.** Bidder must submit one (1) hard copy of the SBD, Technical, and Price Proposal.	Yes	No	0 point
Evaluation Criteria	**Technical Threshold: 70%**			Weighting
Experience	Bidder must provide at least three (3) reference letters stating detailed successful Coaching for EXCO and Managers. The reference letters must be dated and not older than four (4) years. Letters must be on an official company letterhead. 0= 0 points: No reference letters provided 1= 25 points Bidder provided less than three (3) reference letters stating detailed successful Coaching for EXCO and managers. The reference letters must be dated and not older than four (4) years. Letters must be on an official company letterhead. 2= 35 points Bidder provided three (3) reference letters stating detailed successful Coaching for EXCO and Managers. The reference letters must be dated and not older than four (4) years. Letters must be on an official company letterhead. 3= 50 points Bidder provided more than three (3) reference letters stating detailed successful Coaching for EXCO			50 points

	and Managers. The reference letters must be dated and not older than four (4) years. Letters must be on an official company letterhead.	
Capacity to deliver	Bidder must provide capacity in the CVs of the personnel forming part of the project to deliver the required training services with the relevant qualifications per personnel, with a combined experience of at least five (5) years • Six (6) Coaches- CVs with relevant qualifications (Diploma in Social Science, HR, and Management) • One (1) Administrator- CV with relevant qualification (Matric and Certificate in Office Management or Management) • One (1) Project Lead- CV with relevant qualification (Diploma in HR, HRD, or Management) 0= 0 points No CVs and Qualifications provided 1= 25 points Bidder provided capacity in the CVs of the personnel forming part of the project to deliver the required training services with the relevant qualifications per personnel, with a combined experience of less than five (5) years • Six (6) Coaches- CVs with relevant qualifications (Diploma in Social Science, HR, and Management) • One (1) Administrator- CV with relevant qualification (Matric and Certificate in Office Management or Management) • One (1) Project Lead- CV with relevant qualification (Diploma in HR, HRD, or Management) 2= 35 points Bidder provided capacity in the CVs of the personnel forming part of the project to deliver the required	50 points

	training services with the relevant qualifications per personnel with a combined experience of five (5) years • Six (6) Coaches- CVs with relevant qualifications (Diploma in Social Science, HR and Management) • One (1) Administrator- CV with relevant qualification (Matric and Certificate in Office Management or Management) • One (1) Project Lead- CV with relevant qualification (Diploma in HR, HRD or Management) 3= 50 points Bidder provided capacity in the CVs of the personnel forming part of the project to deliver the required training services with the relevant qualifications per personnel with a combined experience of more than five (5) years • Six (6) Coaches- CVs with relevant qualifications (Diploma in Social Science, HR and Management) • One (1) Administrator- CV with relevant qualification (Matric and Certificate in Office Management or Management) • One (1) Project Lead- CV with relevant qualification (Diploma in HR, HRD or Management).	