

**INVITATION TO QUOTE BEY SCM 347**

**APPOINTMENT OF SERVICE PROVIDER TO PROVIDE TRAINING: OCCUPATIONALLY DIRECTED EDUCATION, TRAINING AND DEVELOPMENT PRACTICES**

Quotes are requested from registered service providers for:

National Diploma: Occupationally Directed Education, Training and Development Practices Training

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| **SOUTH AFRICAN QUALIFICATIONS AUTHORITY** |

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| **REGISTERED QUALIFICATION:** |

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| **National Diploma: Occupationally Directed Education, Training and Development Practices** |

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| **SAQA QUAL ID** | **QUALIFICATION TITLE** | | | |
| 50333 | National Diploma: Occupationally Directed Education, Training and Development Practices | | | |
| **ORIGINATOR** | | | | |
| SGB Occupationally-directed ETD Practitioners | | | | |
| **PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY** | | | **NQF SUB-FRAMEWORK** | |
| ETDP SETA - Education, Training and Development Practices Sector Education and Training Authority | | | OQSF - Occupational Qualifications Sub-framework | |
| **QUALIFICATION TYPE** | **FIELD** | | **SUBFIELD** | |
| National Diploma | Field 05 - Education, Training and Development | | Adult Learning | |
| **ABET BAND** | **MINIMUM CREDITS** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **QUAL CLASS** |
| Undefined | 240 | Level 5 | NQF Level 05 | Regular-Unit Stds Based |

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| *In all of the tables in this document, both the pre-2009 NQF Level and the NQF Level is shown. In the text (purpose statements, qualification rules, etc), any references to NQF Levels are to the pre-2009 levels unless specifically stated otherwise.* |

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| This qualification: |

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| **Qual ID** | **Qualification Title** | **Pre-2009 NQF Level** | **NQF Level** | **Min Credits** | **Replacement Status** |
| 48869 | National Diploma: Occupationally Directed Education, Training and Development Practices | Level 5 | Level TBA: Pre-2009 was L5 | 250 |  |

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| **PURPOSE AND RATIONALE OF THE QUALIFICATION** |

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| Purpose:  This qualification is for those who want to build on a FETC, or for those learners who have completed the National Certificate: Occupationally Directed Education, Training and Development, Level 5, to enter the field of Occupationally Directed Education, Training and Development as a potential career, and have little or no previous exposure to Education, Training and Development (ETD). The qualification will also be valuable for those who may have been practising within the field, but without formal recognition. In particular, the Diploma will be useful for:   Needs analysts.   Learning facilitators.   Learning designers.   Assessors.   Learner and learning supporters.   Skills Development Facilitators.   Standards Writers and Qualification Designers.   Education, Training and Development (ETD) Managers  The qualification addresses general competences across eight key ETD roles, and provides an opportunity for learners to specialise in four key areas in line with possible career opportunities or areas of interest. Recipients will thus meet the general requirements of the following key roles, with the opportunity to specialise in four of the roles:   Design and develop learning programmes and processes;   Facilitate and evaluate learning;   Engage in and promote assessment practices;   Provide learning support to learners and organisations;   Conduct skills development facilitation;   Develop standards and qualifications;   Manage and administer education training and development;   Engage in general management activities.  Rationale:  Education, Training and Development (ETD) is a priority area within the South African context and is supported by legislation, national policies and strategies. In order to meet the ETD requirements of the workplace, within the context of a quality assured environment and processes, it is important to be able to identify and recognise competent ETD practitioners at various levels. In particular, all training fields require the services of those ETD practitioners who not only have a broad understanding and skills across all ETD roles, but with deeper skills in relation to a selection of several key ETD roles. Such practitioners will be able to provide leadership and management in relation to ETD practices, while providing specialist skills in key areas.  A survey of the needs of the field yielded overwhelming support for the opportunity for practitioners to be able to select their four specialisations from the full range, without prescribing any one particular role beyond the general component of each role. This means, for example, that not all facilitators need necessarily specialise in design and development and vice versa, but can concentrate on facilitation, assessment, learner support and skills development facilitation. In this way, learners can tailor their specialisations in combination that meet their needs and those of their organisation. Thus the key strength of this qualification is in the choices that learners can make. The Diploma is significantly different from the level 5 Certificate in that the diploma extends the Core component from five ETD roles to eight ETD roles, and requires specialisation in four key roles, whereas the certificate only requires one specialisation. This qualification thus directly meets the needs of the field by providing learners who are competent in the general aspects of eight ETD roles, and with specialist skills in at least four roles.  This qualification will contribute towards the promotion of well designed and implemented outcomes-based approaches to learning design, facilitation and assessment, within the context of a quality assured system. |

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| **LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING** |

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| It is assumed that practitioners have expertise in the subject/occupation field in which they intend to provide education, training and development, at a level required to engage meaningfully in ETD within that field.  Further learning assumptions are specified within the associated unit standards where required.  Recognition of Prior Learning:  This qualification can be achieved wholly or in part through recognition of prior learning in terms of the defined exit level outcomes and/or individual unit standards.  Evidence can be presented in various ways, including international and/or previous local qualifications, products, reports, testimonials mentioning functions performed, work records, portfolios, videos of practice and performance records.  All such evidence will be judged in accordance with the general principles of assessment and the requirements for integrated assessment.  Access to the qualification:  FETC or equivalent bearing in mind Learning Assumed to be in Place. |

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| **RECOGNISE PREVIOUS LEARNING?** |

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| **QUALIFICATION RULES** |

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|  Fundamental: all 20 credits for Communications.   Core: all 86 core credits.   Elective: 134 credits must be achieved from the possible 222 credits. For the purposes of this qualification to be met, learners should seek to obtain all the elective credits from at least four Exit Level Outcomes and make up the rest of the credits from the Elective unit standards associated with the remaining Exit Level Outcomes. |

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| **EXIT LEVEL OUTCOMES** |

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| 1. Communicate in a variety of ETD settings.  2. Design and develop learning programmes and processes.  3. Facilitate and evaluate learning.  4. Engage in and promote assessment practices.  5. Provide learning support to learners and organisations.  6. Conduct skills development facilitation.  7. Define standards and qualifications.  8. Manage and administer education training and development.  9. Engage in general management activities.  Critical Cross-Field Outcomes:  This qualification addresses the following Critical Cross-Field Outcomes:   Identifying and solving problems in relation to designing and organising learning opportunities and in relation to learner's difficulties within the ETD context.   Working effectively with others as a member of ETD teams in the analysis, design and delivery of ETD.   Organising and managing oneself and one's activities responsibly and effectively when preparing oneself, preparing learning resources and setting up the learning environment.   Collecting, analysing, organising and critically evaluating information about learners, learning needs, learning resources, organisational requirements and national ETD strategies.   Communicating effectively using visual, mathematical and/or language skills when presenting information to learners and discussing the subject matter.   Using science and technology effectively and critically, showing responsibility towards the environment and health of others, mainly in the application of occupation-related technology, but through the appropriate use of ETD-related technology.   Demonstrating an understanding of the world as a set of related systems, and in particular through the linking of ETD and practice within the occupational field.  Learning programmes directed towards this qualification will also contribute to the full personal development of each learner and the social and economic development of the society at large, by making individuals aware of the importance of:   Reflecting on and exploring a variety of strategies to learn more effectively.   Participating as responsible citizens in the life of local, national and global communities.   Being culturally and aesthetically sensitive across a range of social contexts.   Exploring education and career opportunities; and developing entrepreneurial opportunities. |

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| **ASSOCIATED ASSESSMENT CRITERIA** |

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| The purpose of the qualification is achieved via demonstration of competence in terms of the Exit Level Outcomes, which in turn are a function of the associated unit standards. The unit standards associated with each exit level outcome form a coherent cluster, thus facilitating integrated assessment. The manner in which the unit standards have been clustered is outlined in the section on integrated assessment. Assessment criteria are provided for each Exit Level Outcome mainly to address the need for evidence of integration of competencies.  1:   Communication is carried out using media appropriate to the audience and setting.   Communication of facts, concepts, ideas and principles related to specific learning areas is clear and consistent with the requirements of the learning area.   Data obtained from a wide range of texts is accessed and processed in line with the various communication needs.   Language and communication strategies are used effectively to advance vocational and occupational objectives.  2:   Training needs are clearly defined in terms of outcomes, and are linked to performance requirements on the job.   Learning outcomes are aligned with given standards, including unit standards, assessment standards, qualifications or job requirements.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   Methodology used is consistent with the outcomes-based approach.   The design meets target audience needs, is appropriate to the subject matter and expected facilitator, and takes into account results from previous assessments of learners.   The design caters for learners with special needs.   Approaches used comply with adult learning principles and are suitable for achieving the defined outcomes.   The design includes evaluation strategies capable of revealing the value of programmes or interventions.   Learning and assessment design are compatible.   Presentation of materials is fit-for-purpose.   Design and development teams are supervised to maximise individual areas of expertise within a team approach.   Projects are supervised to achieve project objectives.  3:   Preparation is sufficient to ensure all resources and arrangements are in place and the learning site is fit-for-purpose.   Formal plans and structures are implemented according to plans, using appropriate methodologies and in a manner that achieves the learning objectives.   Facilitation is professional and ensures the physical and psychological safety of the learners.   Problems are solved appropriately using a range of techniques.   Facilitation provides for application in workplace.   Facilitation approach creates opportunities for assessment.   Facilitation is self-monitored and behaviour is modified to address weaknesses or difficulties.   Facilitation is carried out in a manner that meets the needs of learners with special needs and barriers to learning.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   Principles of human rights and democracy are observed in the facilitation of learning.   Learning materials and assistive technology is elected to meet the needs of inclusive settings.   Evaluation of ETD providers, services and products ensures reliable and useful information for decision making.  4:   Assessees are adequately supported, prepared and assisted in assessment and/or RPL processes, without compromising the assessment process or results.   Assessment instruments are fit-for-purpose and facilitate the integration of assessment in learning and work environments.   Assessment practices are in line with the principles of outcomes-based assessment.   Assessment decisions are reliable and relevant to pre-determined outcomes.   Feedback is relevant and is given in a constructive manner.   Assessment results are used to improve learning design and facilitation.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   Assessment instruments designed are fit-for-purpose and facilitate the integration of assessment in learning and work environments.   Moderation practises ensure the fairness and reliability of assessment results while contributing to improved assessment practices.  5:   Learners requiring support are identified proactively and sensitively.   Support is given in a manner that enables learners to define objectives, clarify issues, help manage expectations and identify learning path and opportunities.   Support assists learners to identify and understand assessment opportunities, processes and benefits, including the nature and benefits of RPL.   Support ensures learners experience the maximum benefit from learning and assessment, and helps them prepare for and cope with learning and assessment.   Barriers to learning are identified and problems are solved cooperatively within given frameworks. Referrals are made as required.   Support helps to create a safe learning environment and promotes the objectives of learning and the principle of life-long learning.   Advice is helpful, realistic, relevant, valid, impartial and based on learner needs.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   Marginalised and vulnerable individuals are identified and supported in keeping with the principles of supporting those at risk, and appropriate referrals are made where required.   Support is in keeping with principles of education for the Deaf in South Africa, where applicable.  6:   Information and advice on skills development issues is consistent with current skills development practices and requirements.   Information and advice on skills development issues is in line with the needs of the organisation.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   Skills development plans address individual learning needs and are aligned with organisational strategic objectives.   Learning is promoted in line with individual and organisational needs, using appropriate and effective communication techniques.   Records are clear, accessible, accurate and up to date.   ETD interventions are coordinated in line with the skills development plan.   Advise on quality management procedures and systems is in line with the national quality principles and the needs of the organisation.  7.   Participation in standards writing and qualification design is in line with the principles and concepts related to an outcomes-based system in general and the requirements of the NQF in particular.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   The analysis of stakeholder and sector needs identifies required outcomes of learning for the organisation and/or sector.   Standards are defined to meet stakeholder needs and are in line with SAQA requirements.   Qualifications are defined to meet stakeholder needs and are in line with SAQA requirements.  8:   Records are clear, accessible, accurate and up to date.   Records meet the quality requirements of the organisation.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   Plans address individual learning needs and are aligned with organisational strategic objectives.   Resources are allocated and used effectively and within budgets.   Management of the design, development and review of the human resource information system ensures the information is accessible, up to date and transparent within confidentiality requirements.  9:   Team building activities promote team work and the achievement of organisational or departmental goals and objectives.   Management activities utilise and build on the diverse abilities and strengths of team members.  NOTE: If learners choose this role as one of their FOUR specialisation areas, then the following criteria will also apply:   Projects and activities are costed according to sound budgeting principles.   General management activities serve to make best use of diversity within the workplace.   Management activities enhance organisational productivity.   Team building activities facilitate the achievement of set goals and objectives.   Team members are empowered by building on strengths and providing scope for development.   Conflicts are dealt with according to established conflict management principles and in line with organisational policies and procedures.  Integrated assessment:  Evidence of integration will be gained by designing and conducting assessments that ensure the unit standards are assessed in clusters linked to each exit level outcome as identified below. Assessors are to be guided by the detailed specifications indicated in each of the identified unit standards, and further guided by the assessment criteria specified for each exit level outcome, all within the context of an active ETD environment, dealing with divergent and random demands related to ETD.  Assessors should note that evidence of integration may be presented by learners when being assessed against the Unit Standards - thus there should not necessarily be separate assessments for each unit standard and then further assessment for integration at exit level outcome level. Well designed assessments, including formative and summative, should make it possible to gain evidence against the requirements of each Unit Standard while at the same time gaining evidence of integration at exit level outcome level.  For the purposes of integration, assessment should be guided by the following relationships between each exit level outcome and the associated unit standards:   Exit Level Outcome 2:  > Core Unit Standards: > Define target audience profiles and skills gaps.  > Elective Unit Standards: > Develop outcomes-based learning programmes. > Supervise a project team of a developmental project to deliver project objectives. > Devise interventions for learners who have special needs. > Design outcomes-based learning programmes.   Exit Level Outcome 3:  > Core Unit Standards: > Facilitate learning using a variety of given methodologies. > Facilitate the transfer and application of learning in the workplace. > Identify and respond to learners with special needs and barriers to learning. > Evaluate a learning intervention using given evaluation instruments.  > Elective Unit Standards: > Demonstrate understanding of the concept of human rights and democracy and its application in society. > Select learning support materials and assistive technology for inclusive settings. > Evaluate and promote ETD providers, services and products for organisational use.   Exit Level Outcome 4:  > Core Unit Standards: > Conduct outcomes-based assessments.  > Elective Unit Standards: > Design and develop outcomes-based assessments. > Conduct moderation of outcomes-based assessments.   Exit Level Outcome 5:  > Core Unit Standards: > Assist and support learners to manage their learning experiences. > Guide learners about their learning, assessment and recognition opportunities.  > Elective Unit Standards: > Support marginalised, "at risk" and vulnerable individuals and groups and identify appropriate referral services. > Demonstrate knowledge of Deaf culture, the Deaf community and technology, services and education for the Deaf in South Africa.   Exit Level Outcome 6:  > Core Unit Standards: > Provide information and advice regarding skills development and related issues.  > Elective Unit Standards: > Promote a learning culture in an organisation. > Develop an organisational training and development plan. > Coordinate planned skills development interventions in an organisation. > Conduct an analysis to determine outcomes of learning for SD and other purposes. > Advise on the establishment and implementation of a quality management system for skills development practices in an organisation.   Exit Level Outcome 7:  > Core Unit Standards: > Demonstrate understanding of the outcomes-based education and training approach within the context of a National Qualifications Framework.  > Elective Unit Standards: > Conduct an analysis to determine outcomes of learning for SD and other purposes. > Define standards for assessment, education, training and development. > Design and develop qualifications for assessment, education, training and development.   Exit Level Outcome 8:  > Core Unit Standards: > Conduct skills development administration.  > Elective Unit Standards: > Manage the capture, storage and retrieval of human resource information using an information system. > Manage learner information using an information management system. > Manage the design, development and review of a human resource information system.   Exit Level Outcome 9:  > Core Unit Standards: > Build teams to meet set goals and objectives. > Harness diversity and build on strengths of a diverse working environment.  > Elective Unit Standards: > Identify and measure the factors that influence productivity. > Co-ordinate the improvement of productivity within a functional unit. > Record, analyse and prepare cost information. > Empower team members through recognising strengths, encouraging participation in decision making and delegating tasks. > Recruit and select candidates to fill defined positions. > Interpret and manage conflicts within the workplace.  Assessment should be in accordance with the following general and specific principles:   The initial assessment activities should focus on gathering evidence in terms of the exit level outcomes and the main outcomes expressed in the titles of the unit standards to ensure assessment is integrated rather than fragmented. Where assessment at title level is unmanageable, then the assessment can focus on each specific outcome, or groups of specific outcomes. Take special note of the need for integrated assessment.   Evidence must be gathered across the entire range specified in each unit standard, as applicable. Assessment activities should be as close to the real performance as possible, and where simulations or role-plays are used, there should be supporting evidence to prove that the candidate is able to perform in the real situation.   All assessments should be conducted in accordance with the following universally accepted principles of assessment: > Use appropriate, fair and manageable methods that are integrated into real work-related or learning situations. > Judge evidence on the basis of its validity, currency, authenticity and sufficiency. > Ensure assessment processes are systematic, open and consistent. |

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| **INTERNATIONAL COMPARABILITY** |

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| International qualifications were examined to ensure that the qualification structure and unit standards in the National Diploma: Occupationally Directed Education, Training and Development, Level 5 are comparable in terms of level, scope and competencies covered. Qualifications and/or programmes from Singapore, the United Kingdom, United States of America, Australia and New Zealand were selected based on proven best practice within the field of Education and Training. The findings regarding comparisons are as follows:   Singapore:  The National Diploma: Occupationally Directed Education, Training and Development, Level 5 compares favourably in terms of purpose and outcomes with the University Of Melbourne, Asia Graduate Certificate and Diploma in Training and Development and the Singapore Training and Development Association Professional Diploma in Training and Development. The correlation is very close in terms of the design, development, facilitation and assessment outcomes.   United Kingdom:  There is a close correlation between the National Diploma: Occupationally Directed Education, Training and Development, Level 5 and the University of Leicester Diploma in Training and Development, Civil Service College Advanced Diploma in Training and development.   United States of America:  The National Diploma: Occupationally Directed Education, Training and Development, Level 5 compares favourably in terms of purpose, entry level and outcomes with the Texas A&M University Corpus Christi Graduate Courses in Occupational Training and Development and the ASTD Learning Certificate Programme. (The term 'certificate', appears to be at the level of the SA Diploma). For the first time in the ASTD qualifications, we see assessment being introduced at this level. Greater emphasis is placed on best practice at this level within the ASTD qualification, whereas it is only dealt with at Level 6 in the SA qualification. There is far greater emphasis on learner support and assisting learners to manage their learning experiences in the SA qualification than there is in the ASTD qualification. SA is more aligned in this regard with the City and Guilds International Diploma in Training and Teaching. ASTD merely focuses on learner styles and how the different styles of learning need to be considered in instructional design. No emphasis is placed on defining standards and qualifications in the ASTD qualification. An outline of comparability is given below:   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Demonstrate understanding of outcomes based ETD, human rights and democracy.   ASTD Learning Certificate Programme: > Understand the best practices in needs assessment methodologies and learning needs identification, adult learning theory, learning design theory, learning technologies, learning information systems, and marketplace resources (note: programme stated outcomes based ETD).   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Provide learner support to learners and organisations.   ASTD Learning Certificate Programme: > Prepare effectively for a learner-focused training delivery and transfer of the learning to the workplace.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Design and develop learning programmes and processes.   ASTD Learning Certificate Programme: > Create a design document and a complete lesson package including participant guide, instructor guide, and other necessary materials.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Facilitate and evaluate learning.   ASTD Learning Certificate Programme: > Measure and evaluate learning solutions and other interventions.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Engage in and promote assessment practices.   ASTD Learning Certificate Programme: > Identify and describe the various types of assessments.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Conduct skills development facilitation.   ASTD Learning Certificate Programme: > Measure and evaluate learning solutions and other interventions.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Manage and administer ETD.   ASTD Learning Certificate Programme: > Understand the current and evolving role of the learning manager in challenging environments.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Define and evaluate standards and qualifications.   ASTD Learning Certificate Programme: > N/A.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Engage in general management objectives.   ASTD Learning Certificate Programme: > Establish a vision by creating a compelling picture of how the learning function improves business performance and enables execution of organizational strategy and partner with business leaders to advocate improving performance through learning. > Establish strategies; develop long-range learning, development, and human performance initiatives to implement the vision; understand what drives business and how the learning function can best add value. > Run the learning function like a business by converting strategies into action plans reconciled with real-life constraints, develop and monitor budgets, and understand staffing and resource deployment.  The National Diploma: Occupationally Directed Education, Training and Development, Level 5 is very well matched to the USA qualification by the International Board of Standards for Training and Instruction, except once again in the area of learner support. This USA qualification also does not make mention of outcomes based training, and merely speaks of "current theory". No mention is made in the US qualification on standards and qualifications. In this qualification assessment is included. The standards are well aligned in terms of design, delivery, evaluation and assessment. A comparison of key outcomes is given below:   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Provide learner support to learners and organisations.   International Board of standards for training and instruction: > Respond appropriately to learners' needs for clarification or feedback.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Design and develop learning programmes and processes.   International Board of standards for training and instruction: > Identify and describe target population characteristics. > Design a curriculum or programme. > Apply current research and theory to the practice of instructional design.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Facilitate and evaluate learning.   International Board of standards for training and instruction: > Demonstrate effective facilitation skills. > Prepare for instruction. > Demonstrate effective facilitation skills. > Evaluate instructional effectiveness. > Evaluate and assess instruction and its impact.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Engage in and promote assessment practices.   International Board of standards for training and instruction: > Assess learning and performance.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Conduct skills development facilitation. > Manage and administer ETD.   International Board of standards for training and instruction: > Manage an environment that fosters learning and performance. > Develop and monitor a strategic training plan. > Apply management skills to the training function. > Report on evaluation information. > Maintain networks to advocate for and support the training function. > Update and improve professional and business knowledge, skills, and attitudes.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Define and evaluate standards and qualifications.   International Board of standards for training and instruction: > N/A.   National Diploma: Occupationally Directed Education, Training and Development, Level 5: > Engage in general management objectives.   International Board of standards for training and instruction: > Apply leadership skills to the training function. > Apply management skills to the training function. > Apply business skills to the training function. > Implement knowledge management solutions.   Australia:  The National Diploma: Occupationally Directed Education, Training and Development, Level 5 has a very close match in terms of the key roles and levels with the AQF Diploma of Training and Assessment Systems.   New Zealand:  Comparisons against the Christchurch College of Education Diploma in Adult Teaching and Learning and the NZQA National Certificate in Adult Education and Training (Level 5).   Summary concerning comparability:  The National Diploma: Occupationally Directed Education, Training and Development, Level 5 compares favourably with a wide selection of international qualifications as identified above, providing a mix of mandatory and optional units that enable candidates to tailor the qualifications to their particular role. Where outcomes or competencies are identified within the international qualifications, they are generally comparable to the South African qualifications in terms of levels and range of competencies covered. |

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| **ARTICULATION OPTIONS** |

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| Learners can move horizontally by achieving the credits specified in the following qualifications:   20159: "National Diploma: ABET Practice", NQF Level 5.   20160: "Certificate: Education", NQF Level 5.   49710: "National Diploma: Development Practice", NQF Level 5.  Learners can move vertically by using this qualification as the basis for the following qualifications:   50330: "National First Degree: Occupationally Directed Education Training and Development Practices", NQF Level 6.   20161: "Bachelor of Education", NQF Level 6.   20485: "National First Degree in ABET Practice", NQF Level 6. |

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| **MODERATION OPTIONS** |

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|  Providers offering learning towards this qualification or the component unit standards must be accredited by the appropriate ETQA.   Moderation of assessment will be overseen by the appropriate ETQA according to moderation principles and the agreed ETQA procedures. |

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| **CRITERIA FOR THE REGISTRATION OF ASSESSORS** |

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| Assessors must be registered in terms of the requirements of SAQA and the appropriate ETQA. |

**PRICING SCHEDULE:**

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|  | **TOTAL PRICE (VAT EXCLUDED)** | **14% VAT** | **TOTAL PRICE (VAT INCLUDED)** |
| Price per Learner | R | R | **R** |

***Number of learners to be confirmed upon award of the ITQ***

***On-site training***

***All traveling, accommodation disbursement etc costs to be included in price***

Quotes must be placed in the municipal tender box, Robert Sobukwe Building, in sealed envelopes clearly marked **"BEY SCM 347**", not later than 12h00 Thursday on the 17TH of November 2022 and will be opened in public immediately thereafter.

**Note:**

1. Faxed, e-mailed or late quotations will not be accepted.
2. The tender will be evaluated on 80/20 system.
3. All contractors must be registered on the Central Supplier Database (CSD)
4. SARS verification pins to be submitted if possible.
5. No upfront payments will be permitted
6. A current certified Municipal (rates& services) clearance certificate to be submitted.
7. Attached MBD forms to be completed.
8. A current certified BBBEE certificate or Sworn Affidavit must be submitted in order to claim preference points.
9. Council is not bound to accept the lowest or any quotation and reserves the right to accept any tender or part thereof.
10. For further details contact **Ms D. Klaasen 049 807 5700 / klaasend@bnlm.gov.za**

**DR. E.M. RANKWANA**

**MUNICIPAL MANAGER**

**DECLARATION OF INTEREST**

1. No bid will be accepted from persons in the service of the state¹.

1. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.

3 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

3.1 Full Name of bidder or his or her representative:……………………………………………..

3.2 Identity Number: ………………………………………………………………………………….

3.3 Position occupied in the Company (director, trustee, hareholder²):………………………..

3.4 Company Registration Number: ……………………………………………………………….

3.5Tax Reference Number:…………………………………………………………………………

3.6VAT Registration Number: ……………………………………………………………………

3.7 The names of all directors / trustees / shareholders members, their individual identity

numbers and state employee numbers must be indicated in paragraph 4 below.

3.8Are you presently in the service of the state? **YES / NO**

3.8.1If yes, furnish particulars. ….……………………………………………………………

……………………………………………………………………………………………..

**¹**MSCM Regulations: “in the service of the state” means to be –

a member of –

any municipal council;

any provincial legislature; or

the national Assembly or the national Council of provinces;

a member of the board of directors of any municipal entity;

an official of any municipality or municipal entity;

an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999);

a member of the accounting authority of any national or provincial public entity; or

an employee of Parliament or a provincial legislature.

² Shareholder” means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.

3.9Have you been in the service of the state for the past twelve months? ………**YES / NO**

3.9.1If yes, furnish particulars.………………………...……………………………………..

……………………………………………………………………………………………. 3.10Do you have any relationship (family, friend, other) with persons

in the service of the state and who may be involved with

the evaluation and or adjudication of this bid?………………………………… **YES / NO**

3.10.1If yes, furnish particulars.

………………………………………………………………………………

………………………………………………………………………………

3.11Are you, aware of any relationship (family, friend, other) between

any other bidder and any persons in the service of the state who

may be involved with the evaluation and or adjudication of this bid? **YES / NO**

3.11.1If yes, furnish particulars

…………………………………………………………………………………

……………………………….……............................................................

3.12Are any of the company’s directors, trustees, managers,

principle shareholders or stakeholders in service of the state? **YES / NO**

3.12.1 If yes, furnish particulars.

……………………………………………………………………………….

……………………………………………………………………………….

3.13 Are any spouse, child or parent of the company’s directors

trustees, managers, principle shareholders or stakeholders

in service of the state? **YES / NO**

3.13.1If yes, furnish particulars.

……………………………………………………………………………….

……………………………………………………………………………….

3.14 Do you or any of the directors, trustees, managers,

principle shareholders, or stakeholders of this company

have any interest in any other related companies or

business whether or not they are bidding for this contract. **YES / NO**

3.14.1 If yes, furnish particulars:

……………………………………………………………………………..

……………………………………………………………………………..

# 4. Full details of directors / trustees / members / shareholders.

|  |  |  |
| --- | --- | --- |
| **Full Name** | **Identity Number** | **State Employee Number** |
|  |  |  |
|  |  |  |
|  |  |  |
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|  |  |  |
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|  |  |  |

………………………………….. ……………………………………..

**Signature Date**

…………………………………. ………………………………………

**Capacity Name of Bidder**

SBD 8

# DECLARATION OF BIDDER’S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. This Standard Bidding Document must form part of all bids invited.
2. It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
3. The bid of any bidder may be disregarded if that bidder, or any of its directors have-
   1. abused the institution’s supply chain management system;
   2. committed fraud or any other improper conduct in relation to such system; or
   3. failed to perform on any previous contract.
4. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Question** | **Yes** | **No** |
| 4.1 | Is the bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?  (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the *audi alteram partem* rule was applied).  **The Database of Restricted Suppliers now resides on the National Treasury’s website(**[www.treasury.gov.za](http://www.treasury.gov.za)**) and can be accessed by clicking on its link at the bottom of the home page.** | Yes | No |
| 4.1.1 | If so, furnish particulars: | | |
| 4.2 | Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?  **The Register for Tender Defaulters can be accessed on the National Treasury’s website (**[**www.treasury.gov.za**](http://www.treasury.gov.za)**) by clicking on its link at the bottom of the home page.** | Yes | No |
| 4.2.1 | If so, furnish particulars: | | |
| 4.3 | Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years? | Yes | No |
| 4.3.1 | If so, furnish particulars: | | |
| 4.4 | Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract? | Yes | No |
| 4.4.1 | If so, furnish particulars: | | |

**CERTIFICATION**

**I, THE UNDERSIGNED (FULL NAME)…………………………………………………**

**CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.**

**………………………………………... …………………………..**

**Signature Date**

**………………………………………. …………………………..**

**Position Name of Bidder**

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.

2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a pe se prohibition meaning that it cannot be justified under any grounds.

3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:

a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution’s supply chain management system and or committed fraud or any other improper conduct in relation to such system.

b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.

4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

SBD 9

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Bid Number and Description)

in response to the invitation for the bid made by:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;

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

3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;

4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;

5. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

(a) has been requested to submit a bid in response to this bid invitation;

(b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and

(c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

SBD 9

6. 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 consortium³ will not be construed as collusive bidding.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

(a) prices;

(b) geographical area where product or service will be rendered (market allocation)

(c) methods, factors or formulas used to calculate prices;

(d) the intention or decision to submit or not to submit, a bid;

(e) the submission of a bid which does not meet the specifications and conditions of the bid; or

(f) bidding with the intention not to win the bid.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

9. 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 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.

SBD 9

10. 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.

………………………………………………… …………………………………

Signature Date

…………………………………………………. …………………………………

Position Name of Bidder

Js914w 2