



**REQUEST FOR BID  
PROFESSIONAL SERVICES**

**BID NUMBER:** **BS/2017/RFB064**

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**CLOSE Date:** **13 July 2018**

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**Time:** **11h00**

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**DESCRIPTION:**

**The BANKSETA seeks to appoint a** suitably qualified service provider who is located in South Africa to facilitate Career Guidance Workshops for Life Orientation Teachers/Educators across provinces to be agreed upon with the BANKSETA.

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**COMPULSORY BRIEFING  
SESSION:**

Yes

☐

No

☒

**Respondent details**

(Use this as a cover page for response document and envelope)

<b>Company Name:</b>	
<b>Completed by:</b>	
<b>Company Postal address</b>	
<b>Email:</b>	
<b>Telephone:</b>	
<b>Mobile number:</b>	
<b>Date:</b>	

Original copy of documents or copy - Mark with X	ORIGINAL		COPY	
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## **1. BANKSETA BACKGROUND**

The Banking Sector Education and Training Authority (BANKSETA) is a statutory body established through the Skills Development Act of 1998 as amended by the Skills Development Act 26 of 2011 to enable its stakeholders to advance the national and global position of the banking and alternative banking sector. As guided by its mandate the BANKSETA is as such an agent of transformation and seeks to promote employment equity and broad-based BEE through skills development.

## **2. BACKGROUND ON THE PROJECT/REQUIREMENTS**

The BANKSETA seeks to appoint a suitably qualified service provider who is located in South Africa to facilitate Career Guidance Workshops for Life Orientation Teachers/Educators across provinces to be agreed upon with the BANKSETA.

## **3. OVERALL OBJECTIVES FOR THE PROJECT**

- The objective of this project is to offer 80 full day workshops over a two year period with a maximum of 40 workshops per year.
- To empower Life-Orientation teachers with knowledge regarding the various careers which are available within the banking and alternative banking sector, resulting in such knowledge being imparted to learners in the various schools.
- The dissemination of career information, occupational shortages and skills gap in the banking and alternative banking sector.
- To provide career guidance related tools to participants that can be used in their respective organisations.

#### 4. RFB TIMELINES

Activity	Time	Date
Closing date	11h00	13 July 2018
Tender evaluation, Bidder Verification and Due Diligence	N/A	23 July 2018
Clarification presentations by Service Providers if required/ Due Diligence	N/A	27 July 2018
Provisional Contract Award	N/A	01 August 2018
Contract Signatures	N/A	07 August 2018

#### 5. SCOPE OF WORK

5.1 Prospective service provider is expected to facilitate 80 workshops in the provinces as guided by the BANKSETA.

- 40 workshop per year for maximum of 50 LO Teachers.
- Provide Facilitator\Trainers
- Provide venue and catering
- Coordinate workshop logistics.
- Quarterly Reporting and annual close out report.
- Service provider must liaise with Provincial Department of Basic Education and district offices.

##### 5.2 Locations

- First year 2018/2019
  - Limpopo
  - KwaZulu-Natal
  - Mpumalanga
- Second year 2019/2020
  - Free State
  - Eastern Cape
  - Western Cape

5.3 The prospective provider is expected to update and reproduce 2000 of the current BANKSETA training manuals which is an approximate of 100 pages.

**The successful service provider is expected to deliver as follows:**

- 5.4 To conduct/facilitate Career Awareness Workshops for Life Orientation Educators.
- 5.5 The training provider is required to provide a geographical spread of the districts and number of schools per region at which career guidance workshops have been conducted and provide a provisional spread of districts and schools at which BANKSETA career guidance workshops will be conducted ;
- 5.6 The BANKSETA will pay for the training of a maximum of 50 attendees per workshop;
- 5.7 The BANKSETA will guide the service provider regarding the provinces in which the training will be conducted;
- 5.8 The provider should confirm their ability to deliver workshops nationally upon receipt of confirmation from the Provincial Department of Basic Education.
- 5.9 Prospective service providers are to provide information stating the network that they have in the particular province and provide a list of venues that they intend to host workshops at.
- 5.10 Prospective service providers are required to arrange a suitable venue and should quote for catering which will include an arrival snack, coffee, tea and pastries , a hot lunch and cold drinks / assorted juices (one per educator). In order to compare costs, respondents are required to indicate in the Pricing Schedule (Annexure A) the cost for catering for a total number of 50 people per workshop with a cost per person.
- 5.11 The prospective provider should provide a portfolio of evidence of similar work performed in the past relating to Life Orientation Teacher training.
- 5.12 The successful service provider is expected to submit a report of the number of teachers trained, their full names, copies of identity documents, details of schools, municipality, province, date of training, learning material distributed, feedback from liaison with the teachers during the training, signed attendance registers and a register of the promotional material distributed at each of the workshops, Life Orientation Teachers evaluation feedback forms and future recommendations must be submitted to BANKSETA.
- 5.13 Where there are more participants the BANKSETA would be willing to reimburse the additional catering cost only provided that the service provider submits evidence of the additional catering through the attendance registers.
- 5.14 The Prospective service provider is expected to promote the BANKSETA brand through the distribution of promotional material and branded signage. (To be provided by BANKSETA).
- 5.15 The BANKSETA will provide the following material
  - Career Guides with a list of shortages and skills gap in the banking and alternative banking sector
  - Branding material and;
  - Posters.

- 5.16 The Prospective service provider is expected to capture pictures of workshop in high resolution and also in a soft copy format in order to submit as evidence of the workshop and for BANKSETA marketing and communication purposes.

## **6. COMPETENCY AND EXPERTISE REQUIRED**

The appointed service provider must meet the following requirements:

- 6.1 Must have a minimum of three years' experience in the facilitation of Life Orientation workshops.
- 6.2 The cvs of the Facilitators and Project Managers must have indicate a thorough understanding of skills development training and career guidance experience.
- 6.3 The workshops should not revolve around generic Career Guidance issues only but also focus should be on promoting banking as a career of choice as well as on how attendees can best use the information for the learners they reach through Career Guidance.
- 6.4 Meet the BANKSETA's deadlines for the provision of quarterly reports to the Department of Higher Education and Training. Reports to be submitted should be accompanied by supporting documentation.
- 6.5 Demonstrate good understanding of the aims and objectives of BANKSETA and of SETA's in general.
- 6.6 The service provider is required to provide a minimum of **three signed references**, on the company letterhead of the referee, for which similar services have been rendered.

## **7 PRICING STRUCTURE**

The Pricing Schedule must be completed as per annexure A.

- 7.1 The quoted prices will remain fixed for the duration of the first year of the contract. Bidders are therefore required to indicate a percentage increase in their price for 2019-2020.
- 7.2 The attached pricing sheets (Appendix A) must be completed in full. The BANKSETA will not entertain pricing adjustments after the signing of any contracts, and it is therefore most important that all pricing elements are disclosed.
- 7.3 Per the pricing sheet all pricing should show VAT separately.
- 7.4 Sufficient detail should be included to enable the BANKSETA to fully understand the make-up of the overall pricing.
- 7.5 All pricing assumptions, excluded costs and estimated costs must be clearly documented. The BANKSETA assumes that the pricing document as supplied is complete and covers all costs associated with this project.
- 7.6 Whilst complying with normal commercial confidentiality requirements, the BANKSETA reserves the right to discuss aspects of the pricing with other SETAs to satisfy itself that the pricing as contained in any received proposal avoids fruitless and wasteful expenditure and is regarded as fair and equitable for the services offered.

7.7 The BANKSETA requires transparency concerning the financial aspects and will work closely with the prospective service provider to ensure a fair and equitable pricing regime for the required services.

8. **DURATION OF THE CONTRACT-** 01 August 2018 to 31 March 2020.

9. The BANKSETA retains the right to increase the number of workshops depending on the service delivery of the successful provider and may increase the number of candidates to be trained if there is available funding and demand.

## 10. SUBMISSION REQUIREMENTS

10.1 One hardcopy must be the original submission, clearly marked "Original" and one (1) copied version of the original and a soft copy.

10.2 All submissions must be delivered in individual envelopes.

10.3 Respondents should take particular care to ensure that there are no discrepancies between all submissions to the BANKSETA.

10.4 The BANKSETA reserves the right to reject any submissions if there are discrepancies.

10.5 Document must be submitted as follows:

10.5.1 **12.5.1A** Envelope 1 – Original

10.5.2 **12.5.1B** Envelope 2 – Hard Copy of the original document and 1 Soft copy

10.5.3 **12.5.1C** Envelope 3 – **Pricing include SBD1** – (invitation to bid)

10.6 Each individual envelope must be clearly marked with the following information:

**10.6.1** Description of the Submission: **Life Orientation Teachers**

**10.6.2** Submission Bid Number: **BS/2017/RFB064**

10.7 Submissions that are faxed, sent via telex, and/ or electronic mail delivery will not be accepted.

10.8 All submissions received by BANKSETA will become the property of the BANKSETA and will not be returned to the respondent.

10.9 The submissions must be inserted into the SUBMISSION BOX available at the Reception Area of BANKSETA Offices at the following address:-

Thornhill Office Park

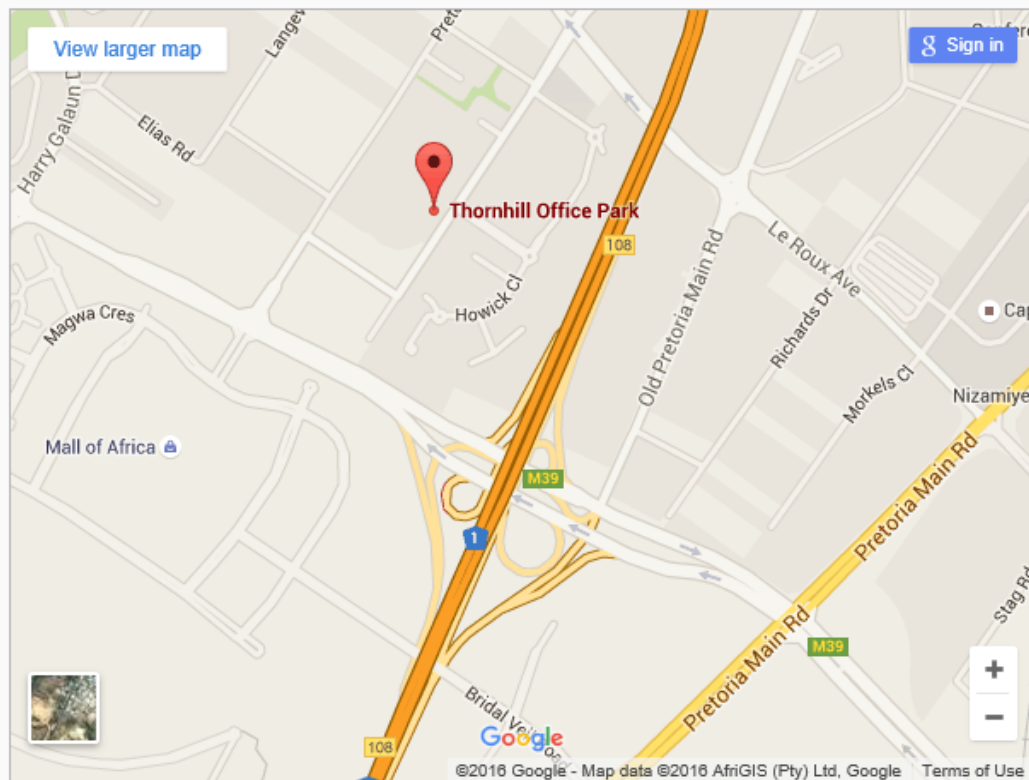
Building 22

94 Bekker Road

MIDRAND

**NB:** Please ensure that you sign the submission register.

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- 10.10 Respondents are invited to observe the closing of the on the closing date and time of the submission as per the advertisement
- 10.11 Unsuccessful submissions will be informed in writing when the process is concluded.
- 10.12 A submission will be considered late if received after the specified date and time. Respondents are therefore strongly advised to ensure that submissions be despatched allowing enough time for any unforeseen events that delay the delivery of the submission.

## 11 ENQUIRIES/COMMUNICATION

**Contact person for enquiries regarding the submission document:**

Ms Eva Ratema

Specialist: Supply Chain Management

Email: [Tenders@bankseta.org.za](mailto:Tenders@bankseta.org.za)

All clarifications or enquiries must be made in by email and received by the BANKSETA on or before the date of the **13 July 2018**. Telephonic requests for clarification will not be accepted.

## 12 SUBMISSION EVALUATION/ADJUDICATION

Submissions will be evaluated in three (3) phases:

- 12.1 Compliance/eligibility;
- 12.2 Technical/Functionality;
- 12.3 Pricing and B- BBEE contribution level.
- 12.4 Bidders that score **70 points** and above will be requested to provide pricing based on the final specification that will be provided to them.
- 12.5 The abovementioned bidders may be requested for presentation by the BANKSETA.

## 13 Compliance/Eligibility Evaluation

Respondents who do not meet the requirements below will be immediately disqualified. For Joint Venture (JV) submissions, each partner to the JV must submit all documents listed below.

No	Description
1	Submission of the following fully completed and signed returnable documents: <ul style="list-style-type: none"><li>- SBD 1 Invitation to submission (to be submitted with the Appendix A)</li><li>- SBD 4 Declaration of interest</li><li>- SBD 6.1 Preference point claim form</li><li>- SBD 8 Declaration of respondents' past supply chain management</li><li>- SBD 9 Certificate of independent bid determination</li></ul>
2	Special Conditions that the bidder needs to accept by signing them: Portion 2
3	Submission of signed Pricing Schedule in BANKSETA template
4	Contract Form : Rendering of Services signed
5	Submission of company registration documents
6	Submission of the National Treasury Central Supply Database (CSD) Master Registration report.



NB: The BANKSETA may conduct risk assessment for the winning bidder.

#### 14. TAX COMPLIANCE

Submission of copy of TAX clearance certificate or SARS pin number in order to verify service provider's TAX compliance status, or submission of written proof from SARS that supplier either has no tax obligation or has made arrangements to meet outstanding tax obligation.

#### 15. Technical/ Functionality Evaluation

The functionality evaluation conducted as per the criteria contained in the table below:

CRITERIA – PHASE 1	Weight	Values	Score
<b>1. Functionality</b>	<b>100</b>		
<b>1. National Foot Print</b>	<b>20</b>		
<ul style="list-style-type: none"> <li>Demonstrate commitment to facilitate workshops sessions in 6 provinces through a project plan and provide information on previous workshops similar to the scope of work. To be in line with the school calendar and approval from district office.</li> </ul> <p>Less than 6 provinces = 0</p> <p>6 Provinces = 5</p>			
<b>2. Experience and Capacity of Project Team</b>	<b>30</b>		
<p>The facilitators' experience must meet the following requirements:</p> <ul style="list-style-type: none"> <li>Five years' experience in training and lecturing in the field of Education, preferably high school and tertiary level.</li> <li>Registered with the South African Council of Educators</li> </ul>			

<b>3. Production of training material</b>	<b>10</b>		
<p><b>The service provider should include:</b></p> <ul style="list-style-type: none"> <li>• A portfolio of work and at least 2 samples of training material publications previously produced</li> </ul> <p>Not submitted- 0</p> <p>Submitted = 5</p>			
<b>4. Network of relationships</b>	<b>25</b>		
<p>Indicate relationship networks with the provincial /district departments of education in the various districts <b>(provide letters from the departments of a similar projects conducted)</b></p> <ul style="list-style-type: none"> <li>• Submitted- 0-1=0</li> <li>• Submitted- 2 = 2</li> <li>• Submitted- 3= 3</li> <li>• Submitted- 4 = 4</li> <li>• Submitted- 5 or more = 5</li> </ul>			
<b>4. Track record of the bidder</b>	<b>15</b>		
<p>Provide signed reference letters on clients' letterheads indicating similar assignments conducted as per the scope of work.</p> <p>References on similar services:</p> <ul style="list-style-type: none"> <li>• 1 Reference = 1</li> <li>• 2 References = 2</li> <li>• 3 References = 3</li> <li>• 4 References = 4</li> <li>• 5 References = 5</li> </ul> <p>NB: Reference must be for the company not the employee (it can be from the same client but different projects).</p>			
<b>Elimination of non-qualifying Bids (score below the minimum threshold of 70%).</b>			

## SCORING MATRIX

SCORE	DISCRIPTION
0	NON RESPONSIVE
1	POOR
2	FAIR
3	AVERAGE
4	GOOD
5	EXCELLENT

Functionality will be evaluated using the following formula:

$$Pf = (So/Ms) \times Ap$$

Where:

- Pf – is the percentage scored for functionality by submission under consideration.
- So – is the total score of the submission in question.
- Ap – is the percentage allocated for functionality.
- Ms – is the maximum score possible.

Any proposal not meeting a minimum threshold of **70 points** on

## 16. POINTS AWARDED FOR PRICE

### 16.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20

$$Ps = 80 \left( 1 - \frac{Pt - P \min}{P \min} \right)$$

Where

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

#### **17. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR**

In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

#### **18. SPECIAL CONDITIONS**

18.1 BANKSETA reserves the right to withdraw or amend terms of reference/specifications by notice in writing by advertising in the media in which the submission was originally advertised prior to the closing date.

18.2 BANKSETA reserves the right not to award any of the submissions submitted.

18.3 The cost of preparing the submissions will not be reimbursed.

18.4 Shortlisted respondents will be invited for presentations.

18.5 Successful respondent will be required to sign a confidentiality/non-disclosure agreement.

**19.** Whilst the BANKSETA is issuing this RFB in good faith, it reserves the right to cancel or delay the selection process at any time without explanation, and reserves the right not to select any of the respondents to this RFB, again without explanation. Further the BANKSETA reserves the right to only accept portions of a Vendor's proposal.

## **20. REVIEW PROCESS**

- 20.1 In order to evaluate and adjudicate submissions effectively, it is imperative that respondents submit responsive submissions. To ensure a submission will be regarded as responsive it is imperative to comply with all conditions pertaining to the submission and to complete all the mandatory fields and questionnaires.
- 20.2 All submissions duly lodged as per the submission requirements will be evaluated in accordance with the stipulated evaluation criteria.
- 20.3 BANKSETA may require presentations from short-listed respondents as part of the submission process.

## **21. REASONS FOR REJECTION**

- 21.1 Respondents shall not contact BANKSETA on any matter pertaining to the submission from the time the submission is closed to the time the submission has been adjudicated. The results of all submissions will be published by the BANKSETA. Any effort by a respondent to influence the submission evaluation, submission comparisons or submission award decisions in any matter, may result in rejection of the submission concerned.
- 21.2 BANKSETA shall reject a submission if the respondent has committed a proven corrupt or fraudulent act in competing for a particular contract.
- 21.3 BANKSETA reserves the right to contact references during the evaluation and adjudication process.

## **22. JOINT VENTURE**

- 22.1. In the case of a Joint Venture, the following will be Applicable:
- 22.2. Each JV Member must have a valid Tax Clearance Certificate issued by SARS;
- 22.3 A Joint Venture Agreement is signed by the JV Partners and attached to this tender document; and
- 22.4 A Joint Venture BBBEE Rating Certificate.