



## REQUEST FOR BID PROFESSIONAL SERVICES

**BID NUMBER:** BS/2018/RFB402

**CLOSE Date:** 18 July 2018

**Time:** 11h00

**DESCRIPTION:** **THE BANKSETA IS SEEKING TO APPOINT A SUITABLY ACCREDITED TRAINING PROVIDER LOCATED IN SOUTH AFRICA TO PROVIDE AFRICAN EXPANSION LEADERSHIP PROGRAMME.**

**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>				
<b>Original copy of documents or copy - Mark with X</b>	<b>ORIGINAL</b>	<b>X</b>	<b>COPY</b>	

## **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 micro-finance industry. 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.

BANKSETA is an enabler of skills development and transformation in the broader banking & microfinance sector and supports people development through partnerships, skills development, alleviating unemployment, creating a brighter future and enabling change. BANKSETA focuses on SMEs, the youth, adult education, continuous professional development and research.

Skills development has been identified as a key requirement for economic growth in South Africa, as a result, the Skills Development Act provides a framework for the development of skills in the workplace. Amongst other things, the Act makes provision for skills development by means of a levy-grant scheme, and the establishment of 21 sector-specific Sector Education and Training Authorities – or SETAs – to administer the scheme's funds, and manage the skills development process. Each separate economic sector has one SETA, and BANKSETA is the Banking Sector Education and Training Authority. BANKSETA is widely regarded as one of the best SETAs in South Africa. Successive years of unqualified audits confirm BANKSETA's commitment to carrying out its mandate in a professional and accountable manner.

## **2. BACKGROUND TO ASSIGNMENT**

The BANKSETA is seeking to appoint a suitably accredited training provider located in South Africa to facilitate African Expansion Leadership Programme for the BANKSETA.

This intervention is a highly targeted one, with the specific aim of providing the local banks with an opportunity to create a high-level talent pool of individuals who can head the establishment of a new bank in any of the selected African countries and enable the transfer of knowledge and skills.

## **2.1. Delegates on the Programme**

The programme aims to provide an opportunity to 20 senior executives per annum to assimilate their current technical skills into those specific for banking as it applies on the African Continent. Delegates will be selected by the identified banks from various parts of Africa based on the need to create a talent pool of banking leaders as well as bring people from across the borders to develop African Banking Leaders so that they will have the knowledge and skills to lead in their respective countries. Delegates will be from South Africa and the rest of Africa with the intention that the programme is aimed at supporting the banking sector growth strategy. The beneficiaries would be a combination of individuals that already possess high level technical skills.

## **2.2. Programme Themes:**

On an annual basis BANKSETA conducts research that informs the skills needs of the sector. For this proposal, the themes are outlined below. In preparing the proposal, prospective service providers must focus on the themes outlined below for both roll outs.

Themes:

- *Agile leadership*
- *Collaborative leadership: working with social partners to grow the bank and the economy*
- *Leadership in uncertainty and complexity*
- *Cultural leadership: Driving a culture of innovation, learning and continuous improvement*
- *Transformational Leadership*
- *Participative Leadership*
- *Employee Oriented Leadership*
- *Inspirational Leadership*
- *Social Responsibilities of a banking leader*

- *Personal Leadership: Mastering the inner self to lead in a bank of the future*

### **2.3. Suggested Countries for the immersive activities:**

The following countries are targeted for 2018/19:

East Africa: Egypt

West Africa: Morocco

Central Africa: Angola

South Africa: Gauteng

The following countries are targeted for 2019/20:

East Africa: Kenya

West Africa: Ivory Coast

Central Africa: Botswana

South Africa: Gauteng

### **2.4. Programme Structure**

- The programme will commence with a local block in South Africa (Gauteng). This block is primarily the theoretical block. This is the only block where theoretical content is to be covered.
- Each of the three blocks in the African Countries should be 5 days. Most of the day must be filled with immersions and visits to relevant banking organisations that impact the establishment and running of a bank. At least one day must be a mini-conference/symposium where experts from the resident country present on topics that influence how banking is done in that country with specific focus on the themes outlined.
- The programme must include at least ten webinars (or any other digital format), one per theme. The webinars must be facilitated by international experts in the theme.
- Country case studies for each theme must be developed prior to visits.
- As part of the programme planning and development, a speaker and organisation profile must be prepared well in advance: it must cover what is the purpose of the visit relating to the themes that will be discussed.
- The programme must have a strong personal leadership journey. Describe the approach to be taken for the development of a personal leadership development plan for each delegate. This must culminate in the development

of a personal leadership journey report to showcase the benefit of the programme to the beneficiaries.

### **2.5. Journaling**

- A journal is to be kept by each delegate where they will record their experiences from the programme. The journal is to be used to extract the generic information that will be used to create the Personal Leadership Journey Report.
- An electronic journaling tool is recommended.

### **2.6. Banking Symposium**

- The programme will culminate in a Banking Symposium in South Africa scheduled for February 2019 and February 2020.
- The speakers for this conference will be the 20 delegates on this programme and the topics will relate to the learnings gained on the themes outlined.
- The delegates must be paired into ten teams and each team will develop a detailed research report using qualitative research approach on one of the themes allocated to them. This team will present the reports at the Banking Symposium on Day 1.
- The reports must be consolidated into one “Leadership in Africa” Journal in digital format.
- This conference will be over 2 days and all other banks in South Africa will be invited.

### **2.7. Mentoring and coaching**

- A mentoring and coaching programme to be designed and implemented for the duration of the project.

### **2.8. Public Relations**

- This is a flagship project of BANKSETA and must be well publicised throughout leading to a successful build up to the symposium.

## **3. SCOPE OF WORK**

BANKSETA seeks to appoint a leadership training service provider to deliver the BANKSETA African Expansion Programme. The aim of the programme is to build on

the leadership capabilities of the selected delegates through the use of expert robust discussions, mentorship and immersion activities amongst a range of other tools.

The appointed service provider must deliver the following:

- Project management in line with BANKSETA project management standards.
- Prepare an innovative and creative induction programme.
- Prepare a Programme aligned to the ten themes outlined clearly demonstrating what learning outcomes are to be achieved in all four countries.
- Deliver the Programme in all countries identified; aligning to the ten programme themes.
- Arrange all travel, meals and accommodation for the delegates to all countries and in-country for all aspects of the project. All flights at economy class and hotel accommodation with a minimum four-star rating. All travel, meals and accommodation bookings to be done through the BANKSETA appointed Travel Management Company.
- Arrange the one day mini-conferences/ symposium in each of the selected African countries.
- Prepare the Personal Leadership journey report.
- Allocate the ten themes to the ten groups and mentor the groups in conducting their research and the development of their final research reports.
- Prepare the “Leadership in Africa: Digital Report and hard copies for the conference
- Prepare the full programme for Day 1 of the Symposium where the 20 delegates will be the speakers. This includes preparing a storyboard, programme, and ensuring the delegates are conference ready.

#### **4. PRICING STRUCTURE**

In the Pricing Schedule respondents are required to allow for all costs related to the project. These costs should include the following:

- All flights, accommodation, all meals, airport transfers and in-country transport to be arranged and managed by the Bidder. All flights at economy class and hotel accommodation with a minimum four-star rating. All bookings to be made via the BANKSETA Travel Management Company and BANKSETA will carry the costs directly. The Service Provider may charge a management fee.

- All training costs including induction programme, training, webinars, coaching, etc.
- All costs relating to the development of the ten research reports including the printing of 250 copies for the BANKSETA Symposium

## **5. EXPECTED OUTCOMES AND DELIVERABLES OF THE PROJECT**

- Africa Expansion Programme per year for two years.
- 20 beneficiaries complete the Programme per year for two years.
- 10 research papers relating to the themes presented as a “Leadership in Africa” Digital Journal and 250 copies for the conference per year for two years.
- Personal Leadership Journey Report per year for two years.
- Day 1 of the Banking Symposium Programme Design per year for two years.

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

- Experience in leadership development internationally
- Established relationships with relevant networks in all identified countries
- Experience in designing and managing immersions
- Experience in using webinars or digital learning tools
- Experience in research and preparing research reports
- Experience in mentoring business leaders

## **7. DURATION**

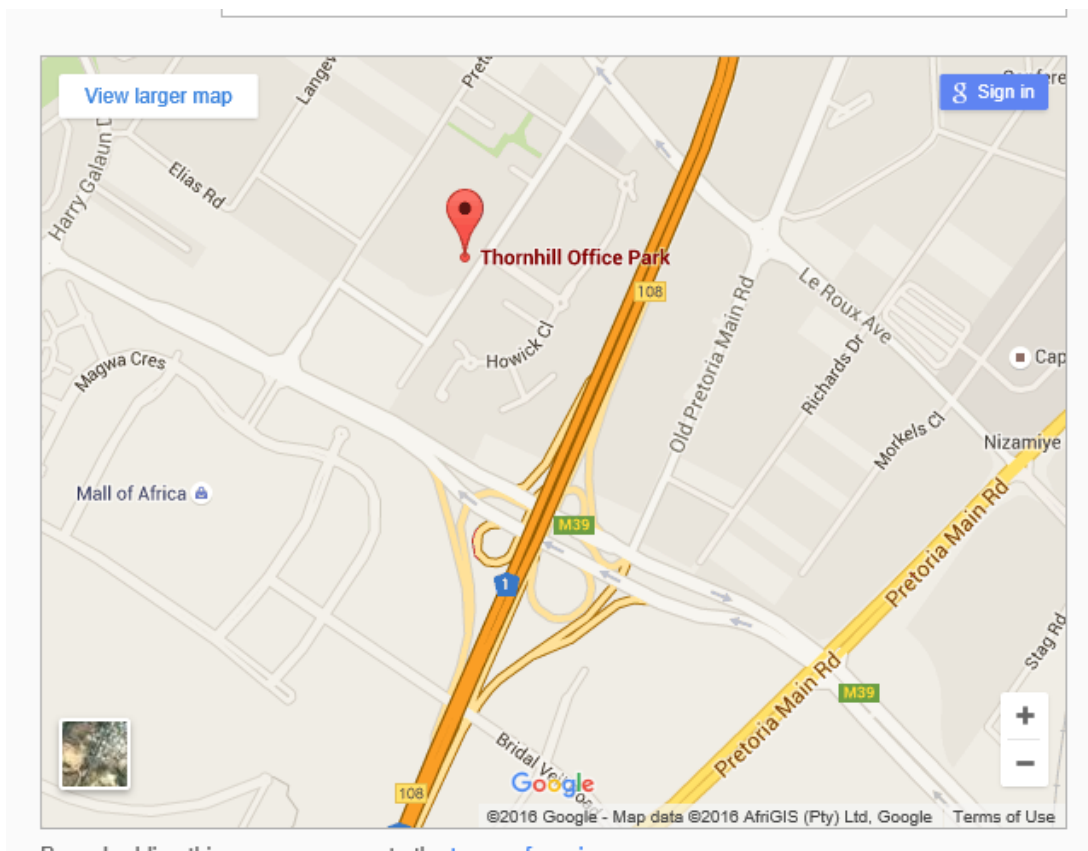
- The duration of the contract shall be from date of signature (i.e. July 2018) until 31st of March, 2020.
- The first roll out to commence by August 2018 and it is expected to continue to February 2019.

- The second roll out to commence by April 2019 and it is expected to continue to February 2020.

## **8. SUBMISSION REQUIREMENTS**

- 8.1** One hardcopy must be the original submission, clearly marked "Original" and one (1) copied version of the original and a soft copy.
- 8.2** All submissions must be delivered in individual envelopes.
- 8.3** Respondents should take particular care to ensure that there are no discrepancies between all submissions to the BANKSETA.
- 8.4** The BANKSETA reserves the right to reject any submissions if there are discrepancies.
- 8.5** Documents must be submitted as follows:
  - 8.5.1** Envelope 1 – 1 Original
  - 8.5.2** Envelope 2 - 1 Hard Copy of the original document and 1 Soft copy
  - 8.5.3** Envelope 3 – Pricing include SBD1 – (Invitation to bid)
- 8.6** Each individual envelope must be clearly marked with the following information:
  - 8.6.1** Description of the Submission:
  - 8.6.2** Submission Bid Number: BS/2018/RFB402
- 8.7** Submissions that are faxed, sent via telex, and/ or electronic mail delivery will not be accepted.
- 8.8** All submissions received by BANKSETA will become the property of the BANKSETA and will not be returned to the respondent.
- 8.9** 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.





- 8.10 Respondents are invited to observe the closing date and time of the submission as per the advertisement.
- 8.11 Unsuccessful submissions will be informed in writing when the process is concluded.
- 8.12 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.

## 9. ENQUIRIES/COMMUNICATION

### 9.1 Contact person for enquiries regarding the submission document:

Mr. Rapula Sathekge

Specialist: Supply Chain Management

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

All clarifications or enquiries will be addressed during the Briefing session.

## 10. RFB TIMELINES

Activity	Time	Date
Compulsory Briefing Session	11h00	29 June 2018
Final date for clarifying questions		02 July 2018
<b>Closing date</b>	<b>11h00</b>	<b>18 July 2018</b>
Tender evaluation, Bidder Verification and Due Diligence	T.B.A	19-26 July 2018
Provisional Contract Award	T.B.A	01 - 03 August 2018
Contract Signatures	T.B.A	10 August 2018

## 11. TENDER EVALUATION

Tenders will be evaluated in the following three (3) phases:

- 11.1 Compliance/eligibility;
- 11.2 Technical/Functionality;
- 11.3 Pricing and B- BBEE contribution level.
- 11.4 Bidders that score **75 points** and above will be requested to provide pricing based on the final specification that will be provided to them.
- 11.5 Shortlisted bidders may be requested to make a presentation to the BANKSETA.

## 12. COMPLIANCE/ELIGIBILITY EVALUATION

Respondents who do not meet the requirements below will immediately be disqualified.

	Description						
1	<div>Submission of the Mandatory requirements.<table><tr><th>REQUIREMENTS</th><th>Comply Yes/No</th></tr><tr><td>Accreditation as a training provider in South Africa.</td><td></td></tr><tr><td>Minimum 3 references letters on company letterhead indicating expertise in training and development</td><td></td></tr></table></div>	REQUIREMENTS	Comply Yes/No	Accreditation as a training provider in South Africa.		Minimum 3 references letters on company letterhead indicating expertise in training and development	
REQUIREMENTS	Comply Yes/No						
Accreditation as a training provider in South Africa.							
Minimum 3 references letters on company letterhead indicating expertise in training and development							
2	<div>Submission of the following fully completed and signed returnable documents:<ul style="list-style-type: none"><li>- SBD 1 Invitation to submission</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><li>- Contract Form : Rendering of Services</li></ul></div>						
3	Special Conditions that the bidder needs to accept: Portion 2.						
4	Submission of signed Pricing Schedule in BANKSETA template.						
5	Submission of company registration documents.						
6	Submission of valid original or copy of tax clearance certificate and a valid pin to verify.						
7	Central Supplier Database Report						

## 13. TECHNICAL/ FUNCTIONALITY EVALUATION

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

CRITERIA – PHASE 1	Weight	Score from a scale of five. 5/5
<b>1. Functionality</b>	<b>100</b>	
<input type="checkbox"/> <b>Planning</b>	<b>10</b>	
<p>Service Provider to provide following :</p> <p>A high level project plan showing major deliverables and milestones, covering all aspects specified in the terms of reference</p> <ul style="list-style-type: none"> <li>• Initiation = 1</li> <li>• Planning = 1</li> <li>• Organizing = 1</li> <li>• Execution = 1</li> <li>• Closure = 1</li> </ul>		
<input type="checkbox"/> <b>Experience of Project Team/Staff Requirements.</b>	<b>15</b>	
<p>The service provider must provide CVs of project team that will meet the following requirements:</p> <ul style="list-style-type: none"> <li>• Programme Director - (minimum of 3 years' experience in managing international programmes) = 1</li> <li>• Project Manager – (minimum of 3 years' experience in managing international programmes) = 1</li> <li>• Integrator/Orchestrator (minimum of 3 year relevant experience) = 1</li> <li>• Researcher (minimum of 3 year relevant experience) = 1</li> <li>• Logistics co-ordinator (minimum of 3 year relevant experience) = 1</li> </ul> <p>NB: CVs of the proposed team detailing their capability and experience relevant to this assignment.</p>		
<input type="checkbox"/> <b>Design and Deliver the Programme</b>	<b>60</b>	
Service Provider must demonstrate in the proposal		

<p>the following.</p> <ul style="list-style-type: none"> <li>• Detailed induction programme = 1</li> <li>• Detailed theoretical programme including webinars and summarised profiles of all speakers = 1</li> <li>• Detailed immersion activities including short profile of proposed company visits for study blocks 2, 3 and 4. = 1</li> <li>• Detailed Coaching and Mentoring programme including personal leadership journey =1</li> <li>• Detailed Research proposal resulting in the development of the research reports = 1</li> </ul>		
<input type="checkbox"/> <b>Mini Conferences and International Banking Symposium</b>	<b>15</b>	
<ul style="list-style-type: none"> <li>• Block 2 mini conference programme including summarised speaker profile. = 1</li> <li>• Block 3 mini conference programme including summarised speaker profile. = 1</li> <li>• Block 4 mini conference programme including summarised speaker profile. = 1</li> <li>• Detailed full programme for Day 1 of the Symposium where the 20 delegates will be the speakers. = 2</li> </ul> <p>Provide the speaker profile/s of each block mentioned above.</p>		
<b>Elimination of non-qualifying Bids (score below the minimum threshold of 75%).</b>		

## VALUES

0 – NON RESPONSIVE, 1 – POOR, 2 – FAIR, 3 – AVERAGE, 4 – GOOD, 5 – EXCELLENT

13.1 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 **75 points** on functionality will not be considered further evaluation on price.

13.2 Pricing will be evaluated using the following formula:

**THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

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

**80/20 or 90/10**

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

**Where**

**Ps** = Points scored for price of bid under consideration

**Pt** = Price of bid under consideration

**Pmin** = Price of lowest acceptable bid

**13.3 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 (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

The points scored by a bidder in respect of the B-BBEE contribution will be added to the points scored for price in order to arrive at the overall score.

Points will be rounded off to the nearest 2 decimals.

In the event that two or more tenders have scored equal total points, the contract will be awarded to the bidder scoring the highest number of points for the specified goals or B-BBEE contribution.

#### **14. SPECIAL CONDITIONS**

- 14.1 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.
- 14.2 BANKSETA reserves the right not to award any of the submissions submitted.
- 14.3 The cost of preparing the submissions will not be reimbursed.
- 14.4 Shortlisted respondents may be invited for presentations.
- 14.5 Successful respondent will be required to sign a confidentiality/non-disclosure agreement.

#### **15. REVIEW PROCESS**

- 15.1 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.
- 15.2 All submissions duly lodged as per the submission requirements will be evaluated in accordance with the stipulated evaluation criteria.

## **16. NON-COMMITMENT**

- 16.1** Any attempt to gain information in a manner deemed to be unfair or disadvantageous to other bidders or any attempt to influence the outcome of the evaluation will result in immediate disqualification from the bid process.
- 16.2** All costs associated with any aspect of developing a response to this Request for Expression of Interest including, but not limited, to transport, accommodation, document collection and document delivery are for the Bidder's account.
- 16.3** Although BANKSETA has endeavoured to provide bidders with as much information as possible. It makes no guarantee as to either the completeness or accuracy of the scope of services set out herein. It is the responsibility of the Bidder to clarify any uncertainties and/or to confirm any assumptions it may be making.
- 16.4** BANKSETA does not take any responsibility whatsoever in respect of errors in the bid submissions.
- 16.5** All submissions received by BANKSETA will become the property of the BANKSETA and will not be returned to the bidders.
- 16.6** BANKSETA is not bound to accept any of the applications submitted.

## **17. OTHER BANKSETA REQUIREMENTS:**

- 17.1** Understand that BANKSETA reserves copyright to this commissioned material for future use. All materials must be produced in line with BANKSETA's Corporate Identity (CI) and signed off by BANKSETA before implementation.
- 17.2** The collateral of all programmes commissioned by BANKSETA will show the SETA's corporate identity design as either the primary or as the sole design.
- 17.3** Adhere to the BANKSETA Project Management Methodology as we subscribe to the PRINCE 2 project management processes. Ability to meet BANKSETA deadlines.



## **18. REASONS FOR REJECTION**

- 18.1 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.
- 18.2 The results of all submissions will be published by the BANKSETA.
- 18.3 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.
- 18.4 BANKSETA shall reject a submission if the respondent has committed a proven corrupt or fraudulent act in competing for a particular contract.
- 18.5 BANKSETA reserves the right to contact references during the evaluation and adjudication process.

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