



REQUEST FOR BID PROFESSIONAL SERVICES

BID NUMBER: BS/2018/RFB406

CLOSE Date: 21 August 2018

Time: 11h00

DESCRIPTION: **THE BANKSETA IS SEEKING TO APPOINT A SUITABLY ACCREDITED TRAINING PROVIDER LOCATED IN SOUTH AFRICA TO PROVIDE BUSINESS ANALYSIS TRAINING**

COMPULSORY BRIEFING SESSION:

Yes

☒

No

☐

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

Company Name:				
Completed by:				
Company Postal address				
Email:				
Telephone:				
Mobile number:				
Date:				
Original copy of documents or copy - Mark with X	ORIGINAL	X	COPY	

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 qualified service provider/s who is/are located in South Africa to provide training services for learnership initiative, namely Kuyasa.

Any alliances between service providers will be entertained in this application, provided that evidence of formally agreed upon contracts form part of the proposal.

The BANKSETA will not be responsible for establishing or managing any relationship formed as part of a joint venture or sub-contracting process. For example, the lead provider may need to source in another provider whose expertise entail training of learners with disabilities.

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.

3. STRATEGIC OBJECTIVES & GENERAL INFORMATION

The banking sector has indicated a continuing need for a post graduate programme to give unemployed graduates an opportunity to gain practical skills in the Banking and Alternative Banking Sector. This Learnership is aimed specifically at learners with a valid B Degree or three-year tertiary qualification with majors in information technology, software development, networking, informatics and computer engineering systems or science etc., so that they gain a relevant qualification plus experience in the world of work and become more employable for careers within the Banking and Alternative Banking Sector.

The qualification is at NQF level 6 and is Certificate in Business Analysis

The number of KUYASA (Business Analysis) learners is dependent on funding and is expected to range from 20 to 100 learners.

4. THE PROJECT SCOPE

In summary the scope of this project involves the following:

- a) **Planning** - The submission of a comprehensive overall training course plan and programme.
- b) **Training & Development** – Development, Management and Delivery of training.
- c) **Learner Support** - Mentoring, coaching and counselling of learners in all matters pertaining to the theoretical components of the learnership.

5. SCOPE OF WORK

- 5.1. The service provider must be able to attend meetings in Johannesburg monthly and be available on adhoc should issues needs to be resolved.
- 5.2. Venue requirements are:
 - 5.2.1. Central and within walking distance from public transport.
 - 5.2.2. Facilities must be conducive to learning.
 - 5.2.3. The venue need not include catering but learners must have reasonable access to facilities that provide a variety of food taking special dietary requirements into account.
 - 5.2.4. Must be approved by the BANKSETA before booking.
- 5.3. The provider must make arrangements to accommodate the needs of learners with disabilities. **Bidders are to explain how they intend to support learners with disabilities (partially sighted/ partially deaf etc.) in how they design and deliver their curriculum.** Details of the nature of disability will be provided in due course
- 5.4. Vendors are expected to be sufficiently resourced by way of experienced permanent and experienced temporary staff to be able to cope with peak and variable work periods, and variable numbers of learners.
- 5.5. The actual number of learners will be dependent on the availability of funds. The service provider must adhere to the BANKSETA program timeline.
- 5.6. The notice of bidders is specifically drawn to Section 2 – SPECIAL CONDITIONS THAT THE BIDDER NEEDS TO ACCEPT: PORTION 2, which contains further specific information surrounding this RFB.
- 5.7. Bidders are specifically requested to supply a project plan showing all activities for the first 6 months from Contract Start.
- 5.8. Bidders are specifically requested to provide details of perceived risks and on steps the bidder would suggest are taken to mitigate these risks.

6. 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 training costs including induction programme, training, webinars, coaching, etc.

7. EXPECTED OUTCOMES AND DELIVERABLES OF THE PROJECT

The successful bidder will be expected as a minimum to have the following competencies:

- 7.1. Excellent knowledge of all applicable legislation governing SETAs and the entire learnership process;
- 7.2. Excellent knowledge of the SETA environment;
- 7.3. Excellent knowledge of the BANKSETA and its sector;
- 7.4. The financial stability and resources to perform the required services to the required level;

8. COMPETENCY AND EXPERTISE REQUIRED

- 8.1. Proof of accreditation as an education and training provider with the relevant Quality Assurance Body. The accreditation status must include this qualification.
- 8.2. Experience in providing training for learnerships.
- 8.3. Ability to deliver training nationally to a minimum of 20 and a maximum of 100 learners per intake.
- 8.4. The proposal should clearly indicate how the proposed qualification will build the above competencies from a theoretical content, workplace learning and assessment/evaluation point of view
- 8.5. The provider must be able to deliver training nationally.
- 8.6. Ability to accommodate the needs of learners with disabilities.
- 8.7. The delivery of learning must include contact sessions. Programme delivery refers to the delivery of training including taking responsibility for the logistical arrangements for the delivery including but not limited to the venue, lecturer and material towards the registered qualification that the learnership will culminate in as well as an induction and exit programme. Provide the learners with the approved time schedule on the first day of the induction course.

- 8.8. The assessment addresses the theoretical and practical components and provision should be made for re-assessment of learners who are not yet competent after the first assessment.
- 8.9. The maximum duration of the learnership must be 12 months and must include the theoretical, practical components of the learnership.
- 8.10. The proposal must include an induction programme covering the academic requirements.
- 8.11. Computer literacy and presentation skills programme to be accommodated as part of the time table
- 8.12. The provider will be responsible for all cost and logistics arrangements in respect of graduations but not limited to organising venue, catering, gowns, photography, video, banners, and ext.
- 8.13. The proposal must also include an exit programme to enable the learners who are not employed in the formal economy upon completion of the learnership to seek alternative income generating activities i.e. job faire
- 8.14. The proposal must include a brief outline of the time schedule for learning, the programme outline including specific outcomes for each module, details of the material that will be provided to the learner and details of the learner support mechanisms
- 8.15. The provider needs to provide learners support. Learner support refers to mentoring, coaching and counselling of learners in all matters pertaining to the **theoretical** component of the learnership.
- 8.16. The provider needs to provide a briefing session and toolkit for mentors/coaches from the organisations where the learners will be placed to enable them to support the learners with projects/assignments in the workplace

9. DURATION

- 9.1 The duration of this contract is 3 years, subject to 9.2 and 9.3 clauses.

- 9.2 Bankseta reserves the right to renew the contract annually based on availability of funds, the service provider performance and continued business need.
- 9.3 In all cases bidders notice is drawn to the following: In terms of its licensing agreement, BANKSETA has existing rights until 31 March 2020. All services/goods required in this request for bid extending beyond this date are subject to renewal of its license agreement. BANKSETA therefore reserves the right to terminate any services that could extend beyond 31 March 2020 unless explicitly approved by the BANKSETA CEO or his delegate.

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 Documents must be submitted as follows:
- 10.5.1. Envelope 1 – 1 Original
 - 10.5.2. Envelope 2 - 1 Hard Copy of the original document and 1 Soft copy
 - 10.5.3. 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: **Business Analysis Training for Kuyasa programme.**
 - 10.6.2. Submission Bid Number: **BS/2018/RFB406**

- 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:-

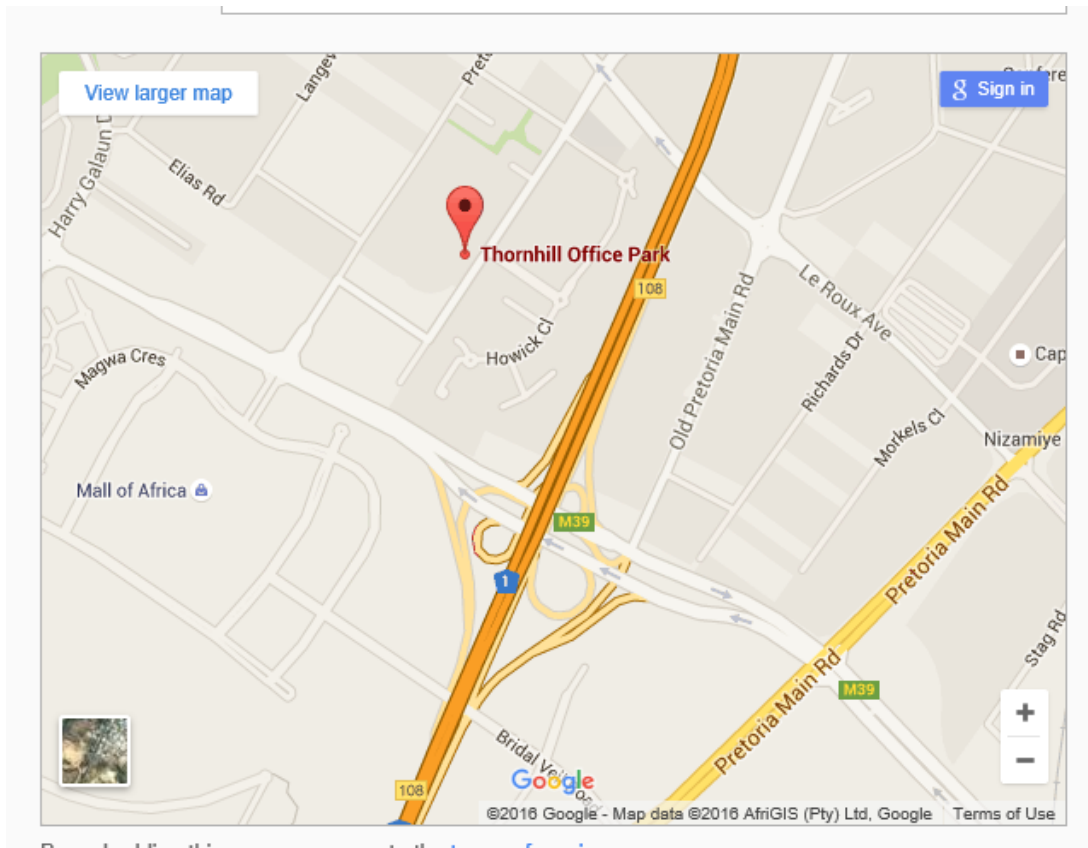
Thornhill Office Park

Building 22

94 Bekker Road

MIDRAND

NB: Please ensure that you sign the submission register.



- 10.10 Respondents are invited to observe 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

11.1 Contact person for enquiries regarding the submission document:

Mr. Rapula Sathekge

Specialist: Supply Chain Management

Email: Tenders@bankseta.org.za

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

12. RFB TIMELINES

Activity	Time	Date
Compulsory Briefing Session	11h00	06 August 2018
Final date for clarifying questions		07August 2018
Closing date	11h00	21 August 2018
Tender evaluation, Bidder Verification and Due Diligence	T.B.A	22-27 August 2018
Provisional Contract Award	T.B.A	28-31 August 2018
Contract Signatures	T.B.A	7 September 2018

Where is bulletin 12?

13. TENDER EVALUATION

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

- 13.1 Compliance/eligibility;
- 13.2 Technical/Functionality;
- 13.3 Pricing and B- BBEE contribution level.

- 13.4 Bidders that score **70 points** and above will be requested to provide pricing based on the final specification that will be provided to them.
- 13.5 Shortlisted bidders may be requested to make a presentation to the BANKSETA.

14. COMPLIANCE/ELIGIBILITY EVALUATION

Respondents who do not meet the requirements below may be disqualified.

	Description				
1	<p>Submission of the Mandatory requirements.</p> <table border="1"> <tr> <td>REQUIREMENTS</td><td>Comply Yes/No</td></tr> <tr> <td>Accreditation Proof of accreditation for business analyst NQF Level 6 with the relevant authority.</td><td></td></tr> </table>	REQUIREMENTS	Comply Yes/No	Accreditation Proof of accreditation for business analyst NQF Level 6 with the relevant authority.	
REQUIREMENTS	Comply Yes/No				
Accreditation Proof of accreditation for business analyst NQF Level 6 with the relevant authority.					
2	<p>Submission of the following fully completed and signed returnable documents:</p> <ul style="list-style-type: none"> - SBD 1 Invitation to submission - SBD 4 Declaration of interest - SBD 6.1 preference point claim form - SBD 8 Declaration of respondents' past supply chain management - SBD 9 Certificate of independent bid determination - Contract Form : Rendering of Services 				
3	Special Conditions that the bidder needs to accepted by signing: 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				

15. 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
1. Functionality	100	
<input type="checkbox"/> National Foot Print	5	
<p>The bidder must provide proof of previous training done or ability to provide training in the following provinces.</p> <p>Presence in the following province and cities: -</p> <ul style="list-style-type: none"> • Western Cape Cape Town • Kwa-Zulu Natal Durban • Gauteng Johannesburg <p>0 Province = 0</p> <p>1 Province = 1</p> <p>2 Provinces = 3</p> <p>3 Provinces = 5</p>		
<input type="checkbox"/> Track record of the bidder.	20	
<p>Provide proof of previous experience on similar assignments. All the references must relate to the implementation of learnerships only.</p> <p>1 Reference = 1</p> <p>2 References = 2</p> <p>3 References = 3</p> <p>4 References = 4</p> <p>5 References = 5</p> <p>NB: Reference must be for the company not the employee on the clients' letterhead.</p>		

☐ Experience of Project Team	15	
<p>The bidder must provide a suitable number of CVs with references which details the learnership programme experience:</p> <p>Composition of Team = 1 Relevant Qualification = 2 Relevant Experience = 2</p> <p>NB: The average score will be used to score the Project Team. The team must provide a minimum of one Project Manager or equivalent, registered moderator, registered assessor and at least two suitably qualified facilitators with business analysis experience.</p>		
☐ Project plan	15	
<p>Service Provider must provide a project plan showing major deliverables, milestones and timelines of at least the following:</p> <ul style="list-style-type: none"> ▪ A detailed project plan. = 2 ▪ A roll out training plan to demonstrate readiness to commence training by 1st of Feb 2019 which includes training venues and facilitators. = 1 ▪ An assessment plan including re-assessments. = 1 ▪ Contingency plan. = 1 		
☐ Training Approach	15	
<p>The Service Provider must demonstrate in their proposal the plan to rollout the training</p> <ul style="list-style-type: none"> • Draft induction programme. = 1 • Learner registration process. = 1 • Content outline. = 1 • Learner Administration. = 2 		

<input type="checkbox"/> Assessment approach.	10	
<p>The Service Provider must demonstrate in their proposal the assessment methodology that will be applied in line with SAQA requirements.</p> <ul style="list-style-type: none"> • Pre-assessment of the learner. = 1 • Assessments including reassessments. =1 • Moderation. =1 • Verification. =1 • Graduation and Certification. =1 		
<input type="checkbox"/> Quality Assurance of the programme	10	
<p>The service provider must provide all relevant policies to ensure compliance with quality assurance requirements.</p> <ul style="list-style-type: none"> • Learner management • Disabilities Management • Assessment. • Appeals <p>*Scoring matrix indicated below will apply: -</p> <p>0 – Non Responsive, 1 – Poor, 2 – Fair, 3 – Average, 4 – Good, 5 – Excellent</p>		
<input type="checkbox"/> Learner support (LS)	10	
<p>The Service Provider must demonstrate in their proposal how learner will be supported during the implementation of the programme.</p> <ul style="list-style-type: none"> • Learners with special needs. =1 • Learners absenteeism. =1 • Mentoring support. =1 • Learners counselling and learners with difficulties. =1 • Exit strategy. =1 		
Elimination of non-qualifying Bids (score below the minimum threshold of 70%).		

VALUES

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

13.1 Functionality will be evaluated using the following formula: $P_f = (S_o/M_s) \times A_p$

Where:

- P_f – is the percentage scored for functionality by submission under consideration.
- S_o – is the total score of the submission in question.
- A_p – is the percentage allocated for functionality.
- M_s – is the maximum score possible.

Any proposal not meeting a minimum threshold of **70 points** on functionality will not be considered further evaluation on price.

13.2 Pricing will be evaluated using the following formula:

THE 80/20

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

80/20

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

Where

- P_s** = Points scored for price of bid under consideration
- P_t** = Price of bid under consideration
- P_{\min}** = 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.

16. SPECIAL CONDITIONS

- 16.1 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.

- 16.2 BANKSETA reserves the right not to award any of the submissions submitted.
- 16.3 The cost of preparing the submissions will not be reimbursed.
- 16.4 Shortlisted respondents may be invited for presentations.
- 16.5 Successful respondent will be required to sign a confidentiality/non-disclosure agreement.

17. REVIEW PROCESS

- 17.1 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.
- 17.2 All submissions duly lodged as per the submission requirements will be evaluated in accordance with the stipulated evaluation criteria.

18. NON-COMMITMENT

- 18.1 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.
- 18.2 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.
- 18.3 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.
- 18.4 BANKSETA does not take any responsibility whatsoever in respect of errors in the bid submissions.

- 18.5 All submissions received by BANKSETA will become the property of the BANKSETA and will not be returned to the bidders.
- 18.6 BANKSETA is not bound to accept any of the applications submitted.

19. OTHER BANKSETA REQUIREMENTS:

- 19.1 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.
- 19.2 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.
- 19.3 Adhere to the BANKSETA Project Management Methodology as we subscribe to the PRINCE 2 project management processes. Ability to meet BANKSETA deadlines.

20. REASONS FOR REJECTION

- 20.1 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.
- 20.2 The results of all submissions will be published by the BANKSETA.
- 20.3 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.
- 20.4 BANKSETA shall reject a submission if the respondent has committed a proven corrupt or fraudulent act in competing for a particular contract.
- 20.5 BANKSETA reserves the right to contact references during the evaluation and adjudication process.

