



REQUEST FOR BID PROFESSIONAL SERVICES

BID NUMBER: BS/2018/RFB408

CLOSE Date: 25 September 2018

Time: 11H00

DESCRIPTION: THE BANKSETA IS SEEKING SOURCE A QUALIFICATION DEVELOPMENT FACILITATOR.

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 purpose of this project is to develop occupationally based qualifications to replace legacy qualifications as per the Quality Council for Trades and Occupations (QCTO) communication that was published on the 17 December 2017, (refer to <http://www.qcto.org.za/images/assessment/REGISTERFORQUALIFICATIONDEVELOPMENTFACILITATORS.pdf>). This brings into effect the QCTO mandate of replacing legacy qualifications with occupational based qualifications over the next 5 years. The

occupational based qualifications need to be developed by a QCTO recognised Qualification Development Facilitator (QDF) as per the abovementioned mandate.

The QDF needs to assist the BANKSETA and the banking and alternative banking sector, through broad and continuous consultation, to develop new occupationally based qualifications that are linked to identified critical skills.

3. SCOPE OF WORK

3.1. In accordance with the QCTO model, the Qualification Development Facilitator must:

- a. Facilitate the development of occupational qualifications using the QCTO qualification development process leading to the development of an occupational profile; knowledge, practical and work experience curricula and assessment specifications;
- b. Conduct international compatibility of the proposed occupational qualifications which will be reflected in the qualification.
- c. In the QCTO format:
 - I. Capture inputs developed under (a) in the prescribed QCTO Qualifications Development format;
 - II. Deliver the following four documents per occupational qualification to the Development Quality Partner;
 - Qualification Document
 - Curriculum Document
 - Assessment specification document
 - Process Report
- d. Transfer of skills: Train and mentor learner qualification development facilitator/s employed by the qualifications development partner (QDP) on

the occupational qualification development process, if assigned to by the QCTO through a Service Level Agreement with the QDP.

- e. The service provider must show capacity and/or network to facilitate workload for parallel/multiple development of occupational qualifications when required by the BANKSETA.

4. PRICING STRUCTURE

In the Pricing Schedule respondents are required to allow for all costs related to the project.

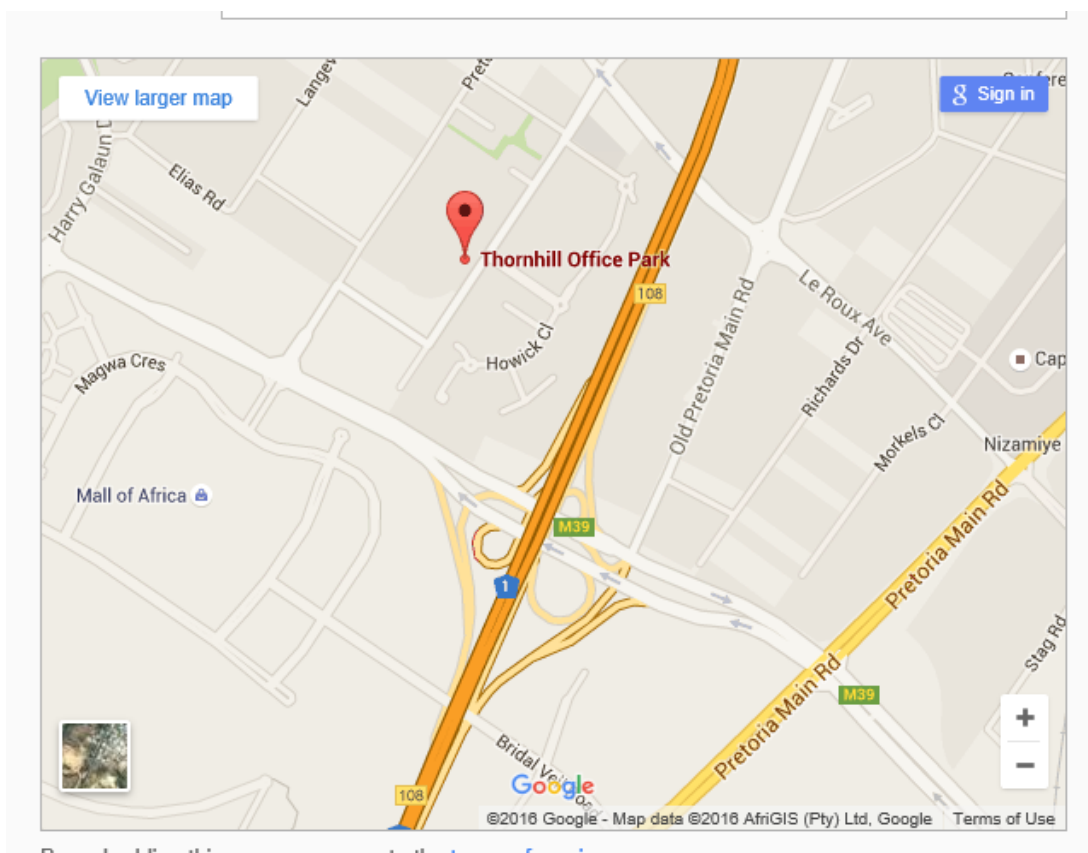
5. DURATION

- 5.1 The duration of this contract is 3 years, subject to 5.2 and 5.3 clauses.
- 5.2 Bankseta reserves the right to renew the contract annually based on availability of funds, provider performance and continued need.
- 5.3 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.

6. SUBMISSION REQUIREMENTS

- 6.1 One hardcopy must be the original submission, clearly marked "Original" and one (1) copied version of the original and a soft copy.
- 6.2 All submissions must be delivered in individual envelopes.
- 6.3 Respondents should take particular care to ensure that there are no discrepancies between all submissions to the BANKSETA.

- 6.4 The BANKSETA reserves the right to reject any submissions if there are discrepancies.
- 6.5 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)
- 6.6 Each individual envelope must be clearly marked with the following information:
- 10.6.1. Description of the Submission: **Qualification Development Facilitator.**
 - 10.6.2. Submission Bid Number: **BS/2018/RFB408**
- 6.7 Submissions that are faxed, sent via telex, and/ or electronic mail delivery will not be accepted.
- 6.8 All submissions received by BANKSETA will become the property of the BANKSETA and will not be returned to the respondent.
- 6.9 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.



- 6.10 Respondents are invited to observe the closing date and time of the submission as per the advertisement.
- 6.11 Unsuccessful submissions will be informed in writing when the process is concluded.
- 6.12 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.

7. ENQUIRIES/COMMUNICATION

7.1 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.

8. RFB TIMELINES

Activity	Time	Date
Compulsory Briefing Session	11h00	10 September 2018
Final date for clarifying questions		11 September 2018
Closing date	11h00	25 September 2018
Tender evaluation, Bidder Verification and Due Diligence	T.B.A	01-05 October 2018
Provisional Contract Award	T.B.A	08 - 17 October 2018
Contract Signatures	T.B.A	31 October 2018

9. TENDER EVALUATION

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

- 9.1 Compliance/eligibility;
- 9.2 Technical/Functionality;
- 9.3 Pricing and B- BBEE contribution level.
- 9.4 Bidders that score **70 points** and above will be requested to provide pricing based on the final specification that will be provided to them.
- 9.5 Shortlisted bidders may be requested to make a presentation to the BANKSETA.

10. 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.

	Description
1	Submission of the Mandatory requirements. <ul style="list-style-type: none">• Proof of registration with QCTO.
2	Submission of the following fully completed and signed returnable documents: <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 accept by signing: Portion 2.
4	Submission of signed Pricing Schedule in BANKSETA template.
5	Submission of company registration documents.
6	Central Supplier Database Report.

NB: The bidder will be given 3 days to submit omitted documents.

11. 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.

12. 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"/> Track record of the bidder.	25	
<p>Provide proof of previous experience on similar assignments. All the references must relate to the development of occupational based qualification.</p> <p>1 Reference = 1</p> <p>2 References = 3</p> <p>3 References = 5</p> <p>NB: Reference must be on the clients' letterhead.</p>		
<input type="checkbox"/> Experience of Project Leader	25	
<p>The Project Leader must have a B. Degree and relevant experience in learning development.</p> <p>3 to 5 years = 1</p> <p>5 > 9 years = 3</p> <p>9 > = 5</p> <p>NB: Provide a CV and certified proof of qualifications of the project leader.</p>		

<input type="checkbox"/> Capacity to handle multiple occupational qualification development.	15									
<p>The team must have at least a B Degree/equivalent and relevant working experience.</p> <table border="1" data-bbox="354 438 1088 718"> <thead> <tr> <th>Resource</th> <th>Experience</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td></td> </tr> <tr> <td>2.</td> <td></td> </tr> <tr> <td>3.</td> <td></td> </tr> </tbody> </table> <p> 2 to 4 years = 1 4 > 7 years = 3 7 > = 5 </p> <p>The average score of facilitators will be used to calculate the scoring.</p> <p>NB: Provide at least two (2) CVs and certified proof of qualifications of facilitators.</p>	Resource	Experience	1.		2.		3.			
Resource	Experience									
1.										
2.										
3.										
<input type="checkbox"/> Project plan	15									
<p>Service Provider must provide a sample project plan showing how the following will be achieved.</p> <ul style="list-style-type: none"> ▪ Deliverables, = 1 ▪ Milestones = 1 ▪ Timelines = 1 ▪ Resourcing = 1 ▪ Stakeholder relationship plan. = 1 <p>NB: Provide a detailed project plan.</p>										

<input type="checkbox"/> Information Management	10	
<p>The Service Provider must be able to capture and store all information related documents developed.</p> <ul style="list-style-type: none"> • Explain how information is stored =3 • Management and Capturing of information =2 <p>NB: Provide policy of information management.</p>		
<input type="checkbox"/> Reporting	10	
<p>The Service Provider must demonstrate how they would report on the following :</p> <ul style="list-style-type: none"> • Progress/Status Report =3 • Close out report =2 <p>NB: Provide sample of the abovementioned reports.</p>		
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

12.1. 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 **70 points** on

functionality will not be considered further evaluation on price.

12.2. Pricing will be evaluated using the following formula:

THE 80/20 PREFERENCE POINT SYSTEMS

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

80/20 or

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

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

12.3. 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.

13. SPECIAL CONDITIONS

- 13.1 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.
- 13.2 BANKSETA reserves the right not to award any of the submissions submitted.
- 13.3 The cost of preparing the submissions will not be reimbursed.
- 13.4 Shortlisted respondents may be invited for presentations.
- 13.5 Successful respondent will be required to sign a confidentiality/non-disclosure agreement.

14. REVIEW PROCESS

- 14.1 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.

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

15. NON-COMMITMENT

- 15.1 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.
- 15.2 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.
- 15.3 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.
- 15.4 BANKSETA does not take any responsibility whatsoever in respect of errors in the bid submissions.
- 15.5 All submissions received by BANKSETA will become the property of the BANKSETA and will not be returned to the bidders.
- 15.6 BANKSETA is not bound to accept any of the applications submitted.

16. OTHER BANKSETA REQUIREMENTS:

- 16.1 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.
- 16.2 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.

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

17. REASONS FOR REJECTION

- 17.1 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.
- 17.2 The results of all submissions will be published by the BANKSETA.
- 17.3 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.
- 17.4 BANKSETA shall reject a submission if the respondent has committed a proven corrupt or fraudulent act in competing for a particular contract.
- 17.5 BANKSETA reserves the right to contact references during the evaluation and adjudication process.

18. BID SPECIFICATION COMMITTEE MEMBERS

1	Name of Committee End-User:	Charmaine Janisch
	Signature:	
	Date:	
2	Name of Committee Member:	Madeleine Pelzer
	Signature:	
	Date:	
3	Name of Committee Member:	Carmen Hoffman
	Signature:	
	Date:	
4	Name of Committee Member:	Elaine Thompson
	Signature:	
	Date:	
5	Name of Compiler:	Rapula Sathekge
	Signature:	
	Date:	