



# **REQUEST FOR BID PROFESSIONAL SERVICES**

**BID NUMBER:** BS/2018/RFB410

**CLOSE Date:** 19 September 2018

**Time:** 11h00

**DESCRIPTION:** Appointment of an Entrepreneurial Skills  
Development Programme service provider.

**BRIEFING SESSION:** Yes ☒ No ☐  
See section 1 on Special Conditions of Bid and Contract  
that the bidder needs to take note of.

## **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>	<input type="checkbox"/>	<b>COPY</b>	<input type="checkbox"/>

## **1. BANKSETA BACKGROUND**

The Banking Sector Education and Training Authority (BANKSETA) is a statutory body established through the Skills Development Act of 1998 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/REQUIREMENT**

The BANKSETA is seeking to appoint a suitably qualified and experienced service provider to deliver an Entrepreneurial Skills Programme at NQF 4 in the broader banking and Microfinance sector. The programme may also be extended to SMEs from other sectors where necessary. This service includes the development a skills programme at NQF level 4; screening selected delegates; the facilitation (lecturing) of the Entrepreneurial skills programme; design, development and implementation of a mentorship programme to candidates of the Programme in Entrepreneurial Skills; organising and hosting of Graduation ceremonies for the successful candidates.

### **2.1 Overall Reasons for the project.**

The Small Business sector is deemed the cornerstone of any healthy economy and proactive small business development is required to improve, sustain and expand it effectively. The programme in Entrepreneurial skills will improve the management expertise and will enable entrepreneurs to optimize their profits via more effective practical business management principles to manage their businesses effectively over the short, medium and long term.

### **2.2 Overall objective(s) for the project.**

2.2.1 Recruit a minimum of 200 candidates from the banking and inclusive banking sector or other sectors as agreed at the start of the programme

2.2.2 Register delegates and deliver the programme to a minimum of 200 delegates per financial year until 31 March 2020 (2 financial years, i.e, 2018/2019 and 2019/2020)

2.2.3 Train, assess and certify the delegates. On successful completion of the course, the learner will receive a Certificate in *Entrepreneurial Skills Programme*, endorsed by the successful bidder.

2.2.4 Provide mentoring to delegates for a period of 6 months after the completion of the academic modules.

### 3. PURPOSE AND OBJECTIVES OF THIS SUBMISSION

This document sets out terms of reference for the request for proposals from external service providers for the Entrepreneurial Skills development programme in the broader banking and Inclusive Banking Sector.

### 4. RFB TIMELINES

Activity	Time	Date
<b>Closing date</b>	<b>11h00</b>	<b>19 September 2018</b>
Non Compulsory Briefing session	10:00	07 September 2018
Tender evaluation, Bidder Verification and Due Diligence	T.B.A	28 September 2018
Clarification presentations by Service Providers if required/ Due Diligence	T.B.A.	28 September 2018
Provisional Contract Award	T.B.A	01 October 2018
Contract Signatures	T.B.A	08 October 2018

## 5. SCOPE OF WORK

IN SCOPE	OUT OF SCOPE
<ul style="list-style-type: none"><li>- Candidates will be drawn from the following sources:<ul style="list-style-type: none"><li>- List of SMEs that are registered with the BANKSETA and SMEs across all sectors. SMEs that are operating in identified rural areas to be agreed upon at the start of the programme</li></ul></li><li>- Programme will be presented in English and the mentoring as well unless otherwise arranged with the SME/candidate as the mentoring will happen one-on-one and not in a group session.</li><li>- Travel and accommodation costs of the service provider should be included in the bid costing</li></ul>	<ul style="list-style-type: none"><li>- Any financial support to SMEs</li><li>- Mentoring beyond the agreed period</li><li>- Payment of Registration fees of companies of any aspiring entrepreneurs</li><li>- Travel and accommodation costs for delegates</li></ul>

### 5.1 Expected outcomes and deliverables of the Project

The appointed service provider must focus on the following aspects:

#### **Recruitment of beneficiaries**

- BANKSETA will provide the successful bidder the database of possible participants, but the provider must be able to source out additional participants, over and above the database that is provided by BANKSETA.

#### **Programme Facilitation:**

- Facilitation of Entrepreneurial skills programme at NQF level 4 or higher
- The programme must cover the following topics:
  - Introduction to Entrepreneurship
  - Entrepreneurial Ideas and Opportunities
  - Entrepreneurial Management Skills
  - Basic Financial Concepts (and Costing and Pricing)

- Finances and the Entrepreneur
- Entrepreneurial Administrative Skills
- Entrepreneurial Legal Skills
- Entrepreneurial Marketing Skills
- Entrepreneurial Planning Skills
- How to submit proposals / tenders for both private or public contracts
- How to access, apply for and manage funding from Banks or Development Finance Agencies
- The successful bidder will be encouraged to use innovative methods of delivering the programme, where applicable
- Service provider must be able to deliver training in all nine provinces. However, for purposes of this programme, training will be limited to five provinces which will be pre-determined by BANKSETA upon contracting time.
- Deliver learning programme to a minimum of 200 delegates in pre-determined areas (200 beneficiaries 2018/19 and 200 2019/2020)
- Training must take place after working hours or during weekends unless SMEs are willing to release employees to attend training during working hours.
- Identify and source a learning support item/s for use by the delegates in the programme. This item/s must be branded according to the BANKSETA corporate identity (CI) specifications, be reasonably priced and be functional.
- Offer a solution to provide the delegates with post training contact and support over and above the mentorship
- Procurement of training venues and catering for the beneficiaries

## **5.2 Design, development and implementation of a Mentorship Programme**

- Design, develop and implement a Mentorship Programme for successful candidates of the Programme in Entrepreneurial Skills;
- Draft and submit a detailed mentorship programme plan

- Deliver mentoring sessions spread over 6 months to candidates, following the academic modules
- Submit all administrative requirements of the programme (attendance registers, evaluation results, and evaluation feedback and mentorship reports) to the BANKSETA on each of the SME/candidates mentored, according to the BANKSETA specifications.
- It is anticipated that the venue for the mentoring will be the premises of the SME. Thus no venue booking fees are to be included for mentoring. Include only travel costs.

### **5.3 Organising and hosting of Graduation ceremonies**

- Identify successful candidates
- Arrange graduation functions for each group in the area where they were trained. Each delegate will be allowed to bring two guests.
- Organise venue and lunches for delegates and guests
- Source rental of graduation gowns
- Photography of candidates and submission of these photos to BANKSETA

### **5.4 Other project administration**

- Meeting minutes and documentation
- Ad hoc administration
- Submit a close out report including lessons learnt and mentorship report at the end of the project.

### **5.5 Project Management:**

- Develop a project plan for the successful implementation of the programme
- Attend all agreed progress meetings

- The successful bidder must submit monthly progress reports of the programme
- Submit a close out report including lessons learnt at the end of the project.

#### **5.6 Functionality and Technical Requirements from the Service Provider**

- A knowledgeable and experienced provider to coordinate the facilitation, mentorship, graduation and other administrative functions
- Proven experience of working with small and micro enterprises
- Service provider must be able to deliver training in all nine provinces. However, for purposes of this programme, training will be limited to five provinces which will be pre-determined by BANKSETA upon contracting time.
- Full details of ability to deliver all components of this programme nationally with no added cost to the delegate.
- Show proven track record of mentoring SMEs on entrepreneurial skills and business development.
- Demonstrate good understanding of the aims and objectives of BANKSETA and of SETA's in general.

#### **5.7 Staff requirements**

- Project management skills.
- Project administration skills
- Understanding of the Banking & inclusive banking Sector and technical knowledge on how it operates.
- Experience in facilitating course in Entrepreneurial skills

#### **5.8 Other BANKSETA requirements:**

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

## **6. Duration of the Contract**

- 08 October 2018 to 31 March 2020.

## **7. COMPETENCY AND EXPERTISE REQUIRED**

- The service provider must have programme accreditation for the Entrepreneurial skills programme that they want to offer.
- A knowledgeable and experienced provider to coordinate the facilitation, mentorship, graduation and other administrative functions
- 5 years Proven experience of working with small and micro enterprises
- Service provider must be able to deliver training in all nine provinces. However for purposes of this programme, training will be limited to five provinces which will be pre-determined by BANKSETA upon contracting time.
- Full details of ability to deliver all components of this programme nationally with no added cost to the delegate.
- Meet the BANKSETA's deadlines
- Show proven track record of mentoring SMEs on entrepreneurial skills and business development.
- Demonstrate good understanding of the aims and objectives of BANKSETA and of SETA's in general.

## **8. PRICING STRUCTURE**

The Pricing Schedule must be completed as per annexure A.

- a. 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.
- b. 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.
- c. Per the pricing sheet all pricing should show VAT separately.



- d. Sufficient detail should be included to enable the BANKSETA to fully understand the make-up of the overall pricing.
- e. 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.
- f. 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.
- g. 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.

**DURATION OF THE CONTRACT-** 08 October 2018 to 31 March 2020.

## **9. SUBMISSION REQUIREMENTS**

9.1 One hardcopy must be the original submission, clearly marked "Original" and two (2) copied versions of the original. All submissions must be delivered in individual envelopes.

9.2 Respondents should take particular care to ensure that there are no discrepancies between all submissions to the BANKSETA. The BANKSETA reserves the right to reject any submissions if there are discrepancies.

### **Document must be submitted as follows:**

Envelope 1 – Original

Envelope 2 – Hard Copy of the original document and 1 Soft copy

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

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

9.3.1 Description of the Submission: **Entrepreneurial Skills Programme**

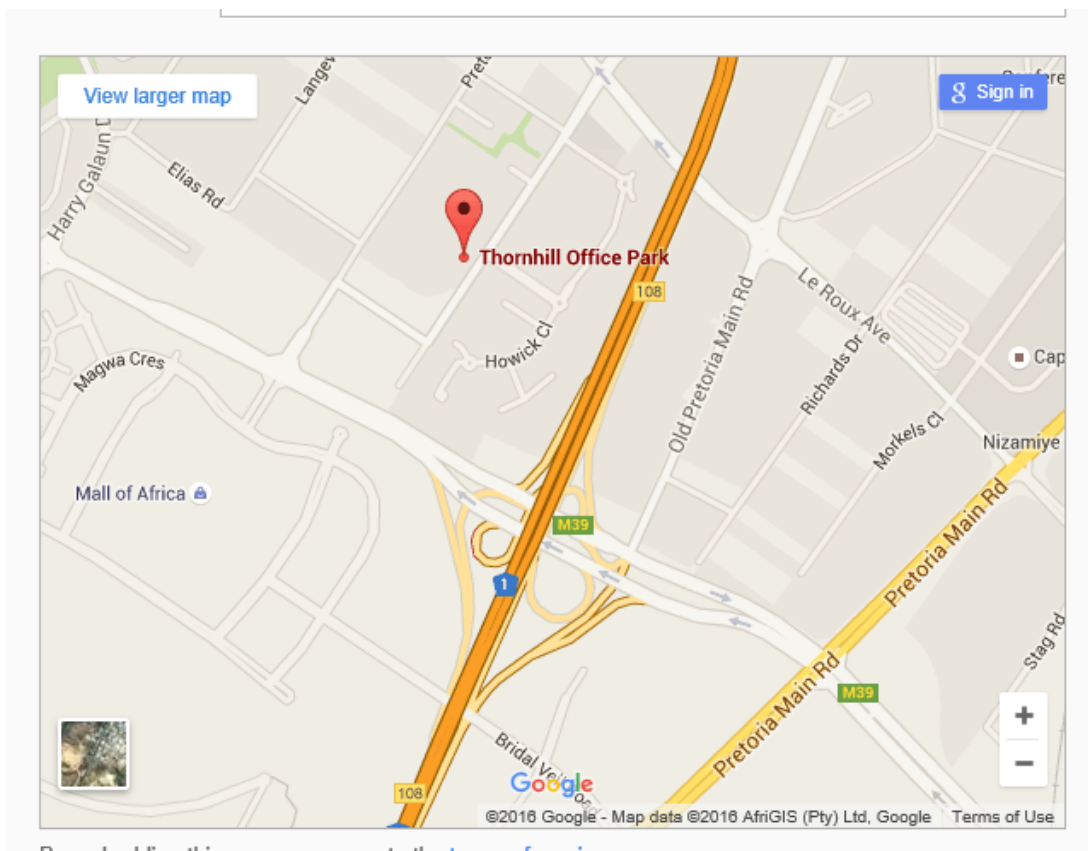
9.3.2 Submission Bid Number: **BS/2017/RFB064**

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

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

9.6 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



9.7 Respondents are invited to observe the closing of the on the closing date and time of the submission as per the advertisement

9.8 Unsuccessful submissions will be informed in writing when the process is concluded.

9.9 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.

**10 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 **12 September 2018**. Telephonic requests for clarification will not be accepted.

**11. SUBMISSION EVALUATION/ADJUDICATION**

Submissions will be evaluated in two (2) phases:

- 11.1 Compliance/eligibility;
- 11.2 Technical/Functionality;
- 11.3 BANKSETA might require shortlisted providers to conduct presentation
- 11.4 Price and BBBEE Evaluation

## 12. Compliance/Eligibility Evaluation

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

	Description										
1	<p>Submission of the Mandatory requirements.</p> <table> <tr> <th>REQUIREMENTS</th><th>Comply Yes/No</th></tr> <tr> <td>Accreditation with relevant quality assuring body for a financial and business management programme, presented at NQF level 4 or higher. *Provide proof of accreditation.</td><td></td></tr> <tr> <td></td><td></td></tr> <tr> <td></td><td></td></tr> <tr> <td></td><td></td></tr> </table>	REQUIREMENTS	Comply Yes/No	Accreditation with relevant quality assuring body for a financial and business management programme, presented at NQF level 4 or higher. *Provide proof of accreditation.							
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Accreditation with relevant quality assuring body for a financial and business management programme, presented at NQF level 4 or higher. *Provide proof of accreditation.											
2	<p>Submission of the following fully completed and signed returnable documents:</p> <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> </ul>										
3	Special Conditions (Portion 2 attached) that the bidder needs to accept by signing the last page:										
4	Contract Form : Rendering of Services (attached) which the bidder needs to accept by signing the last page										
5	Company registration documents										

### 13. Technical/ Functionality Evaluation

The functionality evaluation 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>	100	
<input type="checkbox"/> National Foot Print	10	
<p>The bidder must provide proof to indicate that they will be able to offer training in each province.</p> <p>5 Provinces = 1 6 Provinces = 2 7 Provinces = 3 8 Provinces = 4 9 Provinces = 5</p> <p>NB: The bidder must provide proof of previous projects conducted in all Provinces. Proof required is reference letters from previous projects</p>		
<input type="checkbox"/> Project Plan	10	
<p>The bidder to provide a detailed project plan with realistic time lines showing anticipated activities and phases.</p> <p>All phases of the project management cycle must be demonstrated</p> <ul style="list-style-type: none"> <li>• Deliverables, = 1</li> <li>• Milestones = 1</li> <li>• Timelines = 1</li> <li>• Resourcing = 1</li> <li>• Stakeholder relationship plan. = 1</li> </ul>		
<input type="checkbox"/> Track record of the bidder.	15	
<p>Provide a list of clients where a similar project has been successfully completed with contactable references on the clients Letter head. All references must be relevant to a</p>		

<p>project of this nature</p> <ul style="list-style-type: none"> <li>• One reference letters provided – (Value = 1)</li> <li>• Two reference letters provided – (Value = 2)</li> <li>• Three reference letters provided – (Value = 3)</li> <li>• Four reference letters provided – (Value = 4)</li> <li>• Five reference letters providers (Value = 5)</li> </ul> <p>NB: Reference must be for the company not the employee.</p>		
<input type="checkbox"/> Capacity	20	
<p>The bidder must provide a CV with references which details the project Team experience in delivering this course</p> <p>Project Manager CV Project Facilitators CV's (Minimum 5) Project Administration Team (Minimum 2)</p> <p>NB: The project team competence demonstrated in their CV's must be relevant to this course</p>		
<input type="checkbox"/> Courseware, Assessment	30	
<p>The bidder must provide sample courseware for the modules defined in the course specification. The bidder must supply an assessment strategy document which outlines the method of assessment and certification requirements</p> <p>Provided = 5 Not provided = 0</p>		
<input type="checkbox"/> Mentoring and Coaching	15	
<p>Provide mentorship programme plan</p> <ul style="list-style-type: none"> <li>▪ Deliverables, = 2</li> <li>▪ Milestones = 1</li> </ul>		

<ul style="list-style-type: none"> <li>▪ Timelines = 1</li> <li>▪ Resourcing = 1</li> </ul>		
<b>Elimination of non-qualifying Bids (score below the minimum threshold of 65%).</b>		

### VALUES

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 65 points on functionality will not be considered further evaluation on price.

#### **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 will be invited for presentations.
- 14.5 Successful respondent will be required to sign a confidentiality/non-disclosure agreement.
- 14.6 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.

#### **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.

15.3 BANKSETA may require presentations from short-listed respondents as part of the submission process.



## **16. REASONS FOR REJECTION**

16.1 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.

16.2 BANKSETA shall reject a submission if the respondent has committed a proven corrupt or fraudulent act in competing for a particular contract.

16.3 BANKSETA reserves the right to contact references during the evaluation and adjudication process.