



REQUEST FOR BID PROFESSIONAL SERVICES

BID NUMBER: BS/2018/RFB413

CLOSE Date: 15 October 2018

Time: 11h00

DESCRIPTION: THE BANKSETA IS SEEKING TO APPOINT A SUITABLY PROVIDER TO RECRUIT LEARNERS FOR KUYASA AND LETSEMA PROGRAMME FOR BANKSETA

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	<input checked="" type="checkbox"/>	COPY	<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 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 qualified service provider with experience in active recruitment and who is located in South Africa to recruit learners for learning programmes in the banking and alternative banking sector. The recruitment provider needs to be available to facilitate regular meetings with the BANKSETA and host employers ad hoc.

The recruitment methodology required is active recruitment; where the provider must be proficient in engaging the target audience that the BANKSETA wishes to

support in this initiative. Active recruitment will be the primary recruitment methodology although this does not necessarily exclude advertising.

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 Request For Bid(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. SCOPE OF WORK

3.1. In summary the scope of this project is to assist the BANKSETA to recruit and select suitable learners for learning programmes. Refer to the attached **Service Definition and Service Level Agreement: Appendix A and Appendix B** for additional details on the service requirements. **Appendix D** outlines the candidate selection criteria.

3.2. The following information will be provided to the successful provider upon initiation of each intake:

- Timelines of the programme. The recruitment of learners forms a critical component of all related BANKSETA interventions targeted to Youth Development; hence the provider will be required to adhere to the project timeframe and project requirements.
- The number of learners per programme will vary, but should not exceed 1500 learners per annum. This information will be provided to the service

provider at least two months prior to advertisement. The BANKSETA will entertain de-escalation of pricing based on volumes of learners required.

- Learners may be placed nationally and this information will be provided to the service provider at least two months prior to advertisement.
- The selection criteria will be provided to the service provider at least two months prior to advertisement.
- The preferred psychometric test instrument(s) to be used as part of the recruitment and selection process will be indicated per programme. The dimensions/competencies that will be assessed by the tool(s) shall be guided by the BANKSETA per programme.

3.3. Regardless of which programme the learners are recruited for the following must be adhered to:

- All legal requirements must be met including the adherence to sectoral determinations when completing learnership applications and related documents.
- It should produce suitable learners matching agreed upon criteria in that learners must be able to cope with engaging in the employer environment. The recruitment provider must also provide the possible risks in the recruitment and these must be mitigated.
- Breakdown of learners must meet the minimum National Skills Development Strategy (NSDS) requirements: 85% black, 54% female, 4% disabled.

3.4. The BANKSETA reserves the right to conduct quality assurance on the entire recruitment and selection process; bearing in mind that the recruitment process must be accessible to all potential applicants (inclusive rural as well as urban areas). The service provider will need to provide the BANKSETA with an interview schedule advising venue, date and time of recruitment of candidates for audit requirements.

3.5. All documents, facilities and processes used in the recruitment and selection

process must be approved by the BANKSETA before it may be used. These may include, but is not limited to venues, advertisements, application forms, interview instruments. The BANKSETA also requires that the service provider use an on-line learner management system, in order for real-time learner applications to be viewed.

3.6. The selection process needs to include a structured interview as well as an assessment tool/s that will assess at least, but not limited to the following:

- Trainability and aptitude.
- Level of English proficiency.
- Numeric skills.
- Verbal skills.
- Attitude and motivation.
- Computer Literacy

3.7. In addition, the selection process will include a credit, qualification verification and criminal checks for pending claims and judgements. The service provider will be required to keep files for each successful learner, incorporating the basic information required to process the application. BANKSETA and the prospective recruitment provider to agree on the support documents to augment each learner application.

3.8. The recruited learners' details should include the demographic and geographic details of all successful learners as well as the supporting documents for each learner. The template for reporting will be agreed by the BANKSETA and the prospective recruitment provider.

3.9. The recruitment service provider will need to communicate to those learners that have met the requirements, as advising these learners where they need to report for briefing and induction.

3.10. Regular reporting and monthly service provider meetings will be required on the progress and status of the project. The template for reporting will be

agreed by the BANKSETA and the prospective recruitment provider.

3.11. BANKSETA's lessons learned from previous recruitment processes will be shared with the successful provider.

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 costs related to recruitment including but not limited to advertising.

5. EXPECTED OUTCOMES AND DELIVERABLES OF THE PROJECT

The successful provider will have to comply with following competencies and is expected to provide FULL documentation supporting the required competencies:

- 5.1. The organization responding must have a track record of recruitment, including that of disabled persons.
- 5.2. The organisation must have a track record of task delivery.
- 5.3. The organisation must be able to meet the BANKSETA's deadlines.
- 5.4. The organisation should demonstrate a good understanding of the aims and objectives of BANKSETA and of SETAs in general.
- 5.5. The provider must be proficient in recruitment of unemployed youth through active recruitment as the primary methodology. This will be followed by sourcing learners through word of mouth, exhibitions placed at various Universities and FET / HET colleges, related organisations that provide specific databases and services (such as graduate databases and societies representing vulnerable groups such as disabled), public advertisement and community centres.
- 5.6. Demonstrate experience in active recruitment by which the previously disadvantaged learners are sought from relevant areas and organisations such as, but not limited to church youth groups, societies representing vulnerable

- groups, Department of Labour (DoL) databases of unemployed youth, educational institutions in order to invite and screen the potential candidates.
- 5.7. Should the provider not have the necessary expertise in the recruitment of disabled candidates they may joint venture with appropriate providers to meet this requirement. However, they will remain the lead provider in the recruitment and will take responsibility for the overall recruitment deliverable.
 - 5.8. The recruitment provider must demonstrate an understanding of the BANKSETA landscape and its mandate. The recruitment provider must recruit to suit this landscape and mandate.
 - 5.9. Demonstrate experience in recruiting large numbers of learners. The provider must have a learner management system to handle candidate responses.
 - 5.10. Demonstrating ability to respond to and screen solicited and unsolicited (such as word-of-mouth) applications.
 - 5.11. Demonstrate how its proposed recruitment methodology and approach will ensure that suitable learners with the requisite academic and behavioural competencies will be sourced with a high degree of confidence.
 - 5.12. Demonstrate suitable methodologies for screening learners for Learning Programmes.
 - 5.13. Demonstrate a comprehensive recruitment network in secondary and tertiary institutions as well as disability organisations.
 - 5.14. Demonstrate experience in assessing the orientation and mobility skills of learners including visual disabilities.
 - 5.15. Demonstrate the ability to conduct accessibility audits and Reasonable Accommodation Assessment for Disabled Learners.
 - 5.16. Demonstrate an ability to undertake Medical and Clinical Assessments of Disabled Learners utilising the services of an Occupational Therapist and or clinical psychologist.
 - 5.17. Demonstrate the ability to form networks with disability organisations to assist with the recruitment of learners with disabilities.

- 5.18. Definition of “screening”: Screening refers to the process of matching learners against the agreed upon selection criteria provided by the BANKSETA per programme

6. COMPETENCY AND EXPERTISE REQUIRED

- 6.1. Advertisement(s) must be published in at least one national newspaper as well as in regional newspapers where appropriate. The frequency of advertisement placement(s) will be dictated by meeting the regional target and on a case-by-case basis. Where advertisements have been placed, original proof of same will be required for audit purposes.
- 6.2. Vendors are expected to be sufficiently resourced by way of experienced permanent and experienced temporary staff.
- 6.3. Bidders are specifically requested to provide details of perceived risks and on steps the bidder would suggest are taken to mitigate these risks.

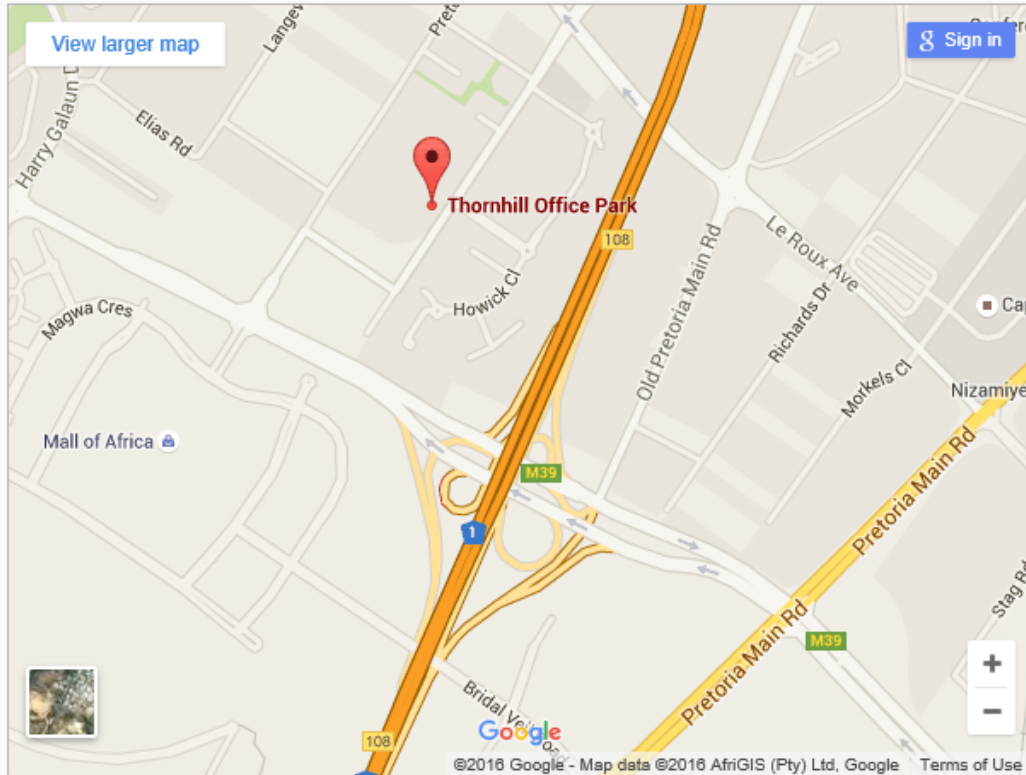
7. DURATION

- 7.1 The duration of this contract is 3 years, subject to 7.2 and 7.3 clauses.
- 7.2 Bankseta reserves the right to renew the contract annually based on availability of funds, provider performance and continued need.
- 7.3 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.

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:
 - 10.6.1. Description of the Submission: **Recruitment of Kuyasa and Letsema Programme.**
 - 10.6.2. Submission Bid Number: **BS/2018/RFB413.**
- 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

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

10. RFB TIMELINES

Activity	Time	Date
Compulsory Briefing Session	11h00	01 October 2018
Final date for clarifying questions		02 October 2018
Closing date	11h00	15 October 2018
Tender evaluation, Bidder Verification and Due Diligence	T.B.A	16-19 October 2018
Provisional Contract Award	T.B.A	24 - 28 October 2018
Contract Signatures	T.B.A	05 November 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 **70 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 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 Mandatory requirements. The bidder must sub-contract if the full bid amount totals to R 30 million and above.
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: Portion 2.
4	Submission of signed Pricing Schedule in BANKSETA template.
5	Submission of company registration documents.
7	Central Supplier Database Report.
8	Service Definition.

12.1 Special tender condition.

The bidder must sub-contract a minimum of 30% of the value of the contract to an EME or QSE which is at least 51% owned by black people, if the full bid amount totals to R 30 million and above. NB: A supplier list for areas of possible subcontracting is attached.

13. 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.

14. 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 work done nationally in South Africa.</p> <p>0 Provinces = 0</p> <p>1-3 Provinces = 1</p> <p>4-6 Provinces = 3</p> <p>7-9 Provinces = 5</p> <p>NB: Proof of recruitment in various provinces</p>		
<input type="checkbox"/> Track record of the bidder.	15	
<p>Provide proof of previous experience on similar assignments. All the references must relate to the recruitment of learners with a minimum of 1000.</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 on the clients' letterhead.</p>		

<input type="checkbox"/> Experience of Project Team	10	
<p>The bidder must provide a suitable number of CVs with references which details the recruitment team experience:</p> <ul style="list-style-type: none"> • Composition of Team (minimum of one project manager and five key recruiters) = 1 • Relevant Qualification(minimum of HR and Project management certificate) = 1 • Relevant Experience (minimum of 5 years) = 3 		
<input type="checkbox"/> Project plan	10	
<p>Service Provider must provide a project plan showing major deliverables, milestones and timelines:</p> <ul style="list-style-type: none"> ▪ A detailed project plan = 3 ▪ Contingency plan = 2 		
<input type="checkbox"/> Recruitment Sourcing Strategy	30	
<p>The Service Provider must demonstrate in their proposal the recruitment methodology</p> <ul style="list-style-type: none"> • Screening of candidates =1 • Selection methodology =1 • Interview Guide =1 • Assessments =1 • Replacement strategy =1 		
<input type="checkbox"/> Data Capturing	10	
<p>The Service Provider must indicate how learners details will be managed</p> <ul style="list-style-type: none"> • Learner details including all supporting documents =3 • Management and Capturing of Learner Data=2 		

<input type="checkbox"/> Assessments of Disabled Learners	10	
<p>The Service Provider must indicate how the following assessments will be conducted</p> <ul style="list-style-type: none"> • medical and clinical assessments =3 • Reasonable accommodation for disabled learners =2 		
<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 		
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

14.1. 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.

14.2. 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

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.

15. SPECIAL CONDITIONS

- 15.1 Sub-Contracting will be requirement for a tender as per *the (Procurement Regulation 2017 Paragraph 9)* of tender over 30 million.
- 15.2 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.
- 15.3 BANKSETA reserves the right not to award any of the submissions submitted.
- 15.4 The cost of preparing the submissions will not be reimbursed.
- 15.5 Shortlisted respondents may be invited for presentations.
- 15.6 Successful respondent will be required to sign a confidentiality/non-disclosure agreement.

16. REVIEW PROCESS

- 16.1 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.
- 16.2 All submissions duly lodged as per the submission requirements will be evaluated in accordance with the stipulated evaluation criteria.

17. NON-COMMITMENT

- 17.1 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.
- 17.2 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.
- 17.3 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.
- 17.4 BANKSETA does not take any responsibility whatsoever in respect of errors in the bid submissions.
- 17.5 All submissions received by BANKSETA will become the property of the BANKSETA and will not be returned to the bidders.
- 17.6 BANKSETA is not bound to accept any of the applications submitted.

18. OTHER BANKSETA REQUIREMENTS:

- 18.1 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.
- 18.2 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.
- 18.3 Adhere to the BANKSETA Project Management Methodology as we subscribe to the PRINCE 2 project management processes. Ability to meet BANKSETA deadlines.

19. REASONS FOR REJECTION

- 19.1 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.
- 19.2 The results of all submissions will be published by the BANKSETA.
- 19.3 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.
- 19.4 BANKSETA shall reject a submission if the respondent has committed a proven corrupt or fraudulent act in competing for a particular contract.
- 19.5 BANKSETA reserves the right to contact references during the evaluation and adjudication process.