



REQUEST FOR BID PROFESSIONAL SERVICES

BID NUMBER: BS/2019/RFB448

CLOSE Date: 17 November 2020

Time: 11h00

DESCRIPTION: APPOINTMENT OF A SUITABLY QUALIFIED BUSINESS SCHOOL TO IMPLEMENT THE INTERNATIONAL EXECUTIVE DEVELOPMENT PROGRAMME (IEDP) IN DEVELOPMENT FINANCE.

BRIEFING SESSION:

NO Briefing session

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		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 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.

For further details on the BANKSETA, visit www.bankseta.org.za and refer to the 2018/19 annual report under publications.

2. PURPOSE AND OBJECTIVES OF THE TENDER

2.1 BANKSETA seeks to appoint a competent and accredited Business School from a Public Higher Education Institution in South Africa to deliver the BANKSETA International Executive Development Programme (IEDP) – Development Finance for the period 2020 – 2021 and 2021-2022.

2.2 The aim of the IEDP is to expose the candidates to best practice in the development finance Sector. In addition, the delegates are tasked with researching an industry relevant topic that adds value to the sector and is benchmarked against international practices. The programme targets policy makers and regulators, as well as board members, executive and senior –level managers of developmental financial institutions.

2.3 The International Executive Development Programme (IEDP), focuses on promoting financial inclusion through stimulating client-centre innovation, exploring the opportunities of digital financial services, and building a sound policy and regulatory framework in South Africa.

2.4 The programme aims to have two groups of 20 delegates each (total 40), there will be one intake of 20 delegates per financial year

2.5 The content of the course should cover the following areas of learning:

Topics are;

- **Financial Inclusion:** Macro-economic relevance of inclusive financial markets and guiding principles
- **Institutional Sustainability:** Measures and levels of sustainability, operational models and case studies
- **Legislative frameworks:** Best -practise legislative and regulatory frameworks and partnership models
- **Technology and digital financial services:** branchless banking and mobile technology as a channel, a means of data collection, a transaction platform, a member and behaviour change tool
- **Theory of innovation:** process management, initiation and implementation of innovation, product innovation case studies - SME finance, housing finance and etc.
- **Credit products:** microenterprise finance, supply chain finance, affordable housing finance
- **Savings and transaction/payments products:** collateral options and credit information
- **Financial education and consumer protection:** Insights will be gained from thought and industry leaders on theories and trends in financial inclusion both locally and globally.

2.6 Delegates will be exposed to various business models in financial services with case studies drawn from appropriate countries, developing an understanding of the key drivers of innovation and sustainable microfinance operations.

3. SCOPE OF WORK

- 3.1 BANKSETA envisage the programme to comprise of 7 study blocks.
- 3.2 The programme must consist of study blocks including a theoretical component and immersion study tours; covers the programme objectives with a South African component.
- 3.3 A total of not more than 20 participants will be on the course and will be selected from a pool of policy makers and regulators, as well as board members, executive and senior – level managers of developmental financial institutions. Other relevant role players could also be included onto the programme at the discretion of BANKSETA. The participants will be selected by BANKSETA.
- 3.4 The academic programme is envisaged to be for a year and should be on NQF level 8. The course does not need to align itself to formal qualification.
- 3.5 Deliver an executive development programme to 2 groups of 20 delegates including course material, facilitation and assessment.
- 3.6 The delivery methodology should include but not limited to webinars, pod casts, E-Learning and facilitated online conversations and classroom.
- 3.7 Arrange for immersion tours locally that will expose delegates to various business models, developing an understanding of key drivers of innovation and sustainable microfinance operations as per the study block requirements.
- 3.8 The business school should provide support to the syndicates through leading edge mentoring and coaching.
- 3.9 Plan and facilitate a networking gala dinner/cultural evening event with a strong theme in development finance.

4. ASSESSMENTS AND ACCREDITATIONS

- 4.1 The appointed business school needs to be accredited with Council for Higher Education in South Africa.
- 4.2 The appointed business school needs to indicate the assessment strategy for the academic content of the programme.
- 4.3 The course entry requirements must take into consideration that participants can be drawn from various stakeholders in the development Finance sector and participants could have varied entry qualifications.
- 4.4 The appointed business school must arrange venue and catering for delegates for the academic study blocks.
- 4.5 The appointed business school must manage all travel and accommodation requirements for all delegates. This includes the sourcing of accommodation, flights and processing of bookings.
- 4.6 The appointed business school must arrange graduations functions for each group and liaise with BANKSETA Marketing and Communication Department to ensure that BANKSETA's corporate Identity (CI) are incorporated.
- 4.7 The appointed business school must arrange photography of candidates and submission of these photos to BANKSETA in high resolution CD format of the graduation.

5. Other BANKSETA's requirement;

- 5.1 The appointed business school is required to:
 - Meet BANKSETA's tight deadlines.
 - Attend all project related status meetings.

6. Costing requirements

6.1 Prospective providers should cost the following;

Year 1:

20 delegates

Year 2:

20 delegates

7. COMPETENCY AND EXPERTISE REQUIREMENTS

- 7.1 The business school must be accredited with the South African Council for Higher Education (CHE).
- 7.2 Experienced in providing executive leadership development programme with international component.
- 7.3 Demonstrate previous experience with international partners or networks to implement the executive programme.
- 7.4 Demonstrate competent academic faculty to implement theoretical modules.
- 7.5 Existing training programme with material developed, in development finance and available to the BANKSETA for consideration.
- 7.6 Demonstrate experience in project managing executive development programmes both locally and internationally.
- 7.7 Project integrator must have qualification(s) in development finance.
- 7.8 The successful bidder will be responsible for the project coordination and management of administrative component (i.e. design, development and customisation of course content, implementation of the programme, close out of the programme).

8. Duration of the Contract

8.1 The contract will be valid from the date of signatures for a period of two years' (date of signature for two years).

8.2 BANKSETA reserves the right to not continue with year two of the contract, as per the signed contract annually based on availability of funds, provider performance and the continued need for the project in its current form.

9. PRICING STRUCTURE

The Pricing Schedule must be completed as per the attached annexure A.

9.1 The quoted prices will remain fixed for the duration of the contract.

9.2 The attached pricing sheets (Appendix A) must be completed in full.

9.3 The BANKSETA will not entertain pricing adjustments after the signing of contract, and it is therefore important that all pricing elements are disclosed.

9.4 The pricing sheet on all pricing should show VAT separately.

9.5 Sufficient detail should be included to enable the BANKSETA to fully understand the make-up of the overall pricing.

9.5 All pricing assumptions must be clearly documented. The BANKSETA assumes that the pricing document as supplied is complete and covers all costs associated with this project.

9.6 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.

9.7 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

10. SUBMISSION REQUIREMENTS

10.1 All submissions must be delivered in individual sealed envelopes in which it is clearly stated that such envelope contains a bid and the bid description / title and reference number for which the bid is being submitted.

10.2 Respondents should take particular care to ensure that there are no discrepancies between all submissions to the BANKSETA.

10.3 The BANKSETA reserves the right to reject any submissions if there are discrepancies.

10.4 Documents must be submitted as follows:

10.1.1 One hardcopy must be the original submission, clearly marked "Original" and one (1) copied version of the original and a soft copy.

10.1.2 A Envelope 1 – Original

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

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

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

- a. Description of the Submission: **APPOINTMENT OF A SUITABLY QUALIFIED BUSINESS SCHOOL TO IMPLEMENT THE INTERNATIONAL EXECUTIVE DEVELOPMENT PROGRAMME (IEDP) IN DEVELOPMENT FINANCE**
- b. Submission Bid Number: **BS/2019/RFB448**
- c. Submissions that are faxed, sent via telex, and/ or electronic mail delivery will not be accepted.

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

e. The submissions must be inserted into the SUBMISSION BOX available at the Reception Area of BANKSETA Offices at the following address: -

The bidders must use gate 1 to enter the Eco-Origins Office park
Eco Origin Office Park

Block C2,

349 Witch-hazel Avenue

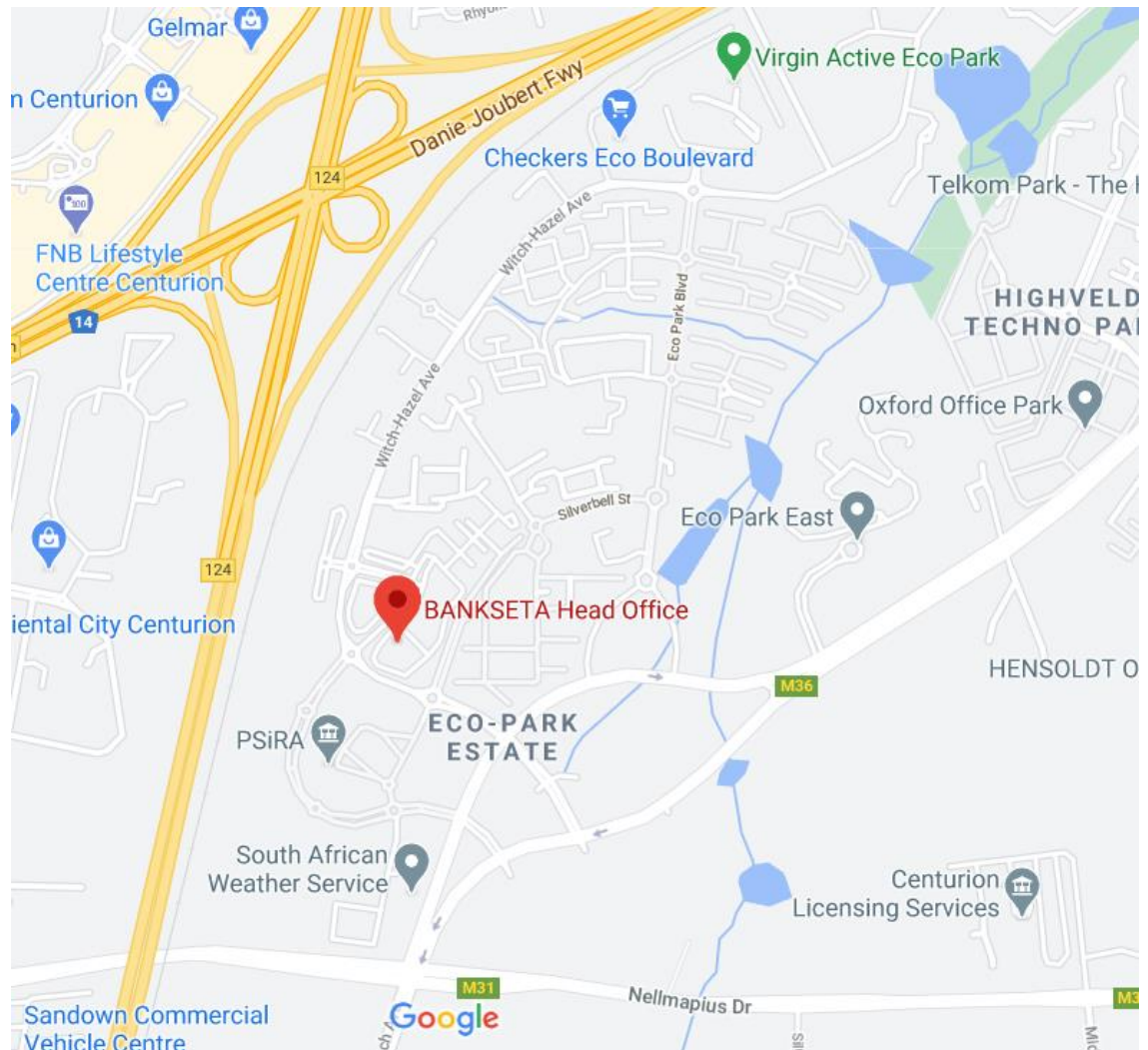
Eco Park Estate

Highveld

Centurion

0144

The BANKSETA is situated in a very large office park with security offices at the main gate. Please allow at least 30 minutes to clear security and navigate through the office park.



- f. NB: Service provider to ensure to sign a register on their submission
- g. Unsuccessful bidders will be informed in writing when the process is concluded.
- h. A tender will be considered late if received after the specified date and time. Service providers are therefore strongly advised to ensure that Tenders be despatched allowing enough time for any unforeseen events that delay the delivery of the Tender.

11. ENQUIRIES/COMMUNICATION

Contact person for enquiries regarding the tender document:

Ms Eva Tabane

Title: Specialist: Supply Chain Management Unit

Email: evat@bankseta.org.za

All clarifications or enquiries must be made in writing and received by the BANKSETA at least a week before closing date of the Tender. Telephonic requests for clarification will not be accepted.

12. RFB TIMELINES

Activity	Time	Date
Closing date	11:00 am	17 November 2020
Tender evaluation, Bidder Verification and Due Diligence		27 November 2020
Provisional Contract Award	T.B.A	11 December 2020
Contract Signatures	T.B.A	18 December 2020

13. TENDER EVALUATION/ADJUDICATION

Bids will be evaluated in three phases:

- 13.1 Compliance/eligibility
- 13.2 Technical/Functionality
- 13.3 Price and BBBEE Evaluation

14. Compliance/Eligibility

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

NB: (For Joint Venture (JV) submissions each partner to the JV must submit all documents listed below).

N.B All relevant forms/documents as prescribed by the PFMA Regulation: Framework for Supply Chain Management accompanying this document must be completed in full and signed where applicable by a duly authorized official of the primary contractor / bidder.

Item	Description
1	Submission of proposal (response document)
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
3	Special Conditions that the bidder needs to accept by signing the last page: Portion 2
4	Submission of company registration documents
5	Submission of current Central Supplier Database report
6	Proof of accreditation with South African Council of Higher Education Accreditation

15. CENTRAL SUPPLIER DATABASE COMPLIANCE REPORT FOR CHECK OF TAX COMPLIANCE

Submission of CSD Compliance report showing the service provider's tax matters to be compliant on closing date and for the bid validity period. The BANKSETA may not make any award to a service provider whose tax matters are not shown as compliant in the CSD report.

16. Technical/ Functionality Evaluation

The evaluation of the functionality of the Request for Proposal will be evaluated as per the criteria contained in the table below;

CRITERIA	WEIGHTINGS	VALUE	SCORE
<p>1. Experience of the bidder in implementing international executive development programmes.</p> <p>Close out reports of previous projects showing the full details of the previous projects undertaken must be submitted.</p> <p>a. One close out report of previous project– (Value = 1)</p> <p>b. Two close out reports of previous projects – (Value = 3)</p> <p>c. Three or more close out reports of previous project – (Value = 5)</p> <p>NB: The close out report/s submitted must show all milestones achieved through the project, this report must come from the project owner. Supported by one page reference from entity where the work was done.</p>	20		
<p>2. Experience of project team in the below listed roles (CV's and certified qualifications of all the team must be submitted)</p> <ul style="list-style-type: none"> Project Executive (Head of Project) <p>a. 1-year experience –Value = 0</p> <p>b. 1 < 2 years' experience – Value = 1</p> <p>c. 2 < 3 years' experience – Value = 2</p> <p>d. 3 < 4 years' experience –Value= 3</p> <p>e. 4 < 5 years' experience -Value= 4</p> <p>f. 5 years' experience- Value = 5</p>	5		
<p>3. Experience of project team in the below listed roles (CV's and certified qualifications of all the team must be submitted)</p> <ul style="list-style-type: none"> Academic Director <p>a. 1-year experience –Value = 0</p>	5		

b. 1 < 2 years' experience – Value = 1 c. 2 < 3 years' experience – Value = 2 d. 3 < 4 years' experience –Value= 3 e. 4 < 5 years' experience -Value= 4 f. 5 years' experience- Value = 5			
4. Experience of project team in the below listed roles (CV's and certified qualifications of all the team must be submitted) <ul style="list-style-type: none"> Faculty Lecturers a. 1-year experience –Value = 0 b. 1 < 2 years' experience – Value = 1 c. 2 < 3 years' experience – Value = 2 d. 3 < 4 years' experience –Value= 3 e. 4 < 5 years' experience -Value= 4 f. 5 years' experience- Value = 5 The BANKSETA will utilise the average number of years for 2 or more lecturers.	5		
5. Experience of project team in the below listed roles (CV's and certified qualifications of all the team must be submitted) <ul style="list-style-type: none"> Project administration manager a. 1-year experience –Value = 0 b. 1 < 2 years' experience – Value = 1 c. 2 < 3 years' experience – Value = 2 d. 3 < 4 years' experience –Value= 3 e. 4 < 5 years' experience -Value= 4 f. 5 years' experience- Value = 5	5		
6. Project Academic Leader <p>a. a. No qualification at NQF L8 or higher qualification in development finance (Value = 0)</p>	10		

Provide CV with an NQF L8 or higher qualification in development finance– (Value = 5)			
7. Programme design Service Provider must demonstrate the following in the proposal: a. Provide a learning map = Value 1 b. Provide assessment methodology = Value 1 c. Provide samples of the learning material (maximum of 10 pages per sample for each learning topic) that was used when implementing a similar programme = Value 3 The bidder will be evaluated on combined elements to the maximum value (5)	25		
8. Detailed project plan The service provider should submit a detailed project plan. a. Initiation- Value = 1 b. Planning – Value = 1 c. Execution- Value = 1 d. Monitoring-Value = 1 e. Closure- Value = 1 The project plan must indicate milestones, activities, time lines, personnel responsibility.	15		
9. Methodology and approach of the bidder to implement immersion tours. The bidder must provide the following; <ul style="list-style-type: none"> • Marketing and communication strategy (1) • Travel logistics strategy (1) • Academic methodology (1) • Proof or demonstration of ability to conduct immersion tours. (2) The bidder will be evaluated on combined elements to the maximum value (5)	10		

TOTAL	100 Points
MINIMUM THRESHOLD	70 Points

SCORE	DESCRIPTION
0	NON RESPONSIVE
1	POOR
2	FAIR
3	AVERAGE
4	GOOD
5	EXCELLENT

17. Functionality will be evaluated using the following formula:

$$Pf = (So/Ms) \times Ap$$

Where:

- Pf – is the percentage scored for functionality by Request for Proposal under consideration.
- So – is the total score of the Request for Proposal in question.
- Ap – is the percentage allocated for functionality.
- Ms – is the maximum score possible.

$$Pf = (So/Ms) \times Ap$$

Where:

- Pf – is the percentage scored for functionality by proposal under consideration.
- So – is the total score of the proposal in question.
- Ap – is the percentage allocated for functionality.
- Ms – is the maximum score possible.

Any proposals not meeting a minimum threshold of **70 points** on functionality will be disqualified.

18. Pricing will be evaluated using the following formula:

80/20 PREFERENCE POINT SYSTEMS

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

Ps = Points scored for price of bid under consideration.

Pt = Price of bid under consideration.

Pmin = Price of lowest acceptable bid.

19. 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 (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	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.

20. SPECIAL CONDITIONS

- 20.1 BANKSETA reserves the right to withdraw or amend terms of reference by notice in writing by advertising in the media in which the tender was originally advertised prior to the closing date.
- 20.2 BANKSETA reserves the right not to award this tender.
- 20.3 The cost of preparing the applications will not be reimbursed.
- 20.4 The BANKSETA reserves the right to conduct a due diligence (including site visits, capacity, assessment and financial capability assessment) on short listed tenderers before contracting.
- 20.5 BANKSETA reserves the right to verify the information submitted and request for further information during evaluation of the proposal.
- 20.6 BANKSETA shall not be liable for any direct, indirect, consequential or other losses or damages including loss of profit that may be incurred by any person including, but not limited to, an Applicant, Short Listed Applicant or Successful Applicant, or any director, officer or associated company thereof, as a result of any reliance on or use of information supplied in response to this tender or as a result of the tender process contemplated in this tender document.
- 20.7 BANKSETA makes no representations, undertakings or warranties whatsoever to any person in respect of the tender or any information contained in the tender.
- 20.8 This tender is confidential and proprietary to BANKSETA and may not be used, reused, copied or distributed for any purpose, other than in relation to the tender process, without BANKSETA's prior written consent.

21. REVIEW PROCESS

- 21.1 In order to evaluate and adjudicate proposals effectively, it is imperative that applicants submit responsive applications. To ensure an application will be regarded as responsive it is imperative to comply with all conditions pertaining to the application and to complete all the mandatory fields and questionnaires.
- 21.2 All applications duly lodged as per the submission requirements will be

evaluated in accordance with the stipulated evaluation criteria.

21.3 All proposals will go through Bid Evaluation Committee (BEC) for evaluation on functionality

21.4 The proposals from BEC will be tabled before the Bid Adjudication Committee (BAC).

21.5 The validity period of proposals is 90 days after closing.

22. REASONS FOR REJECTION

22.1 Applicants shall not contact BANKSETA on any matter pertaining to the application from the time the application is closed to the time the application has been adjudicated. The results of the Tender will be published by the BANKSETA on portal any other platform which was advertised. Any effort by an applicant to influence the evaluation, application comparisons or application award decisions in any matter, may result in rejection of the applicant concerned.

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

23. JOINT VENTURE

23.1 In the case of a Joint Venture, the following will be Applicable:

23.2 Each JV Member must have a valid Tax Clearance Certificate issued by SARS or CSD report showing tax status;

23.3. Submission of a signed Joint Venture Agreement by the JV Partners and attached to this tender document; and

23.4 Submission of a Joint Venture BBBEE Rating Certificate.