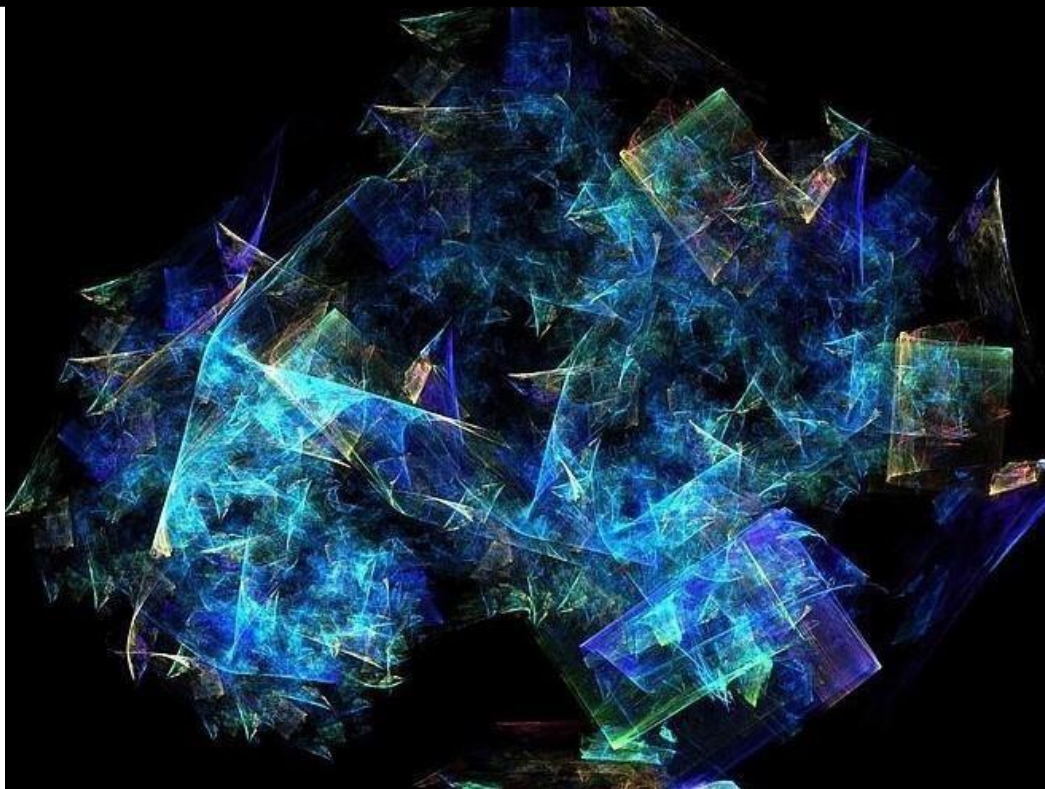




2023

TERMS OF REFERENCE
ETDP SETA FUNDED CAPACITY BUILDING PROGRAMME -
Effective Strategic Management



Background

Over the last several years, successive NSDS and NSDP mandates have been released, including the recent NSDP 2030 document. The Department of Higher Education and Training is dependent on the various stakeholders in skills development for the successful implementation of these desired imperatives and outcomes.

APPETD, through its activities in promoting unity, excellence, and diversity within the private provider sector to the benefit of its members and its constituents, has been granted funding by ETDP SETA to manage the sourcing and implementation of training for relevant Skills and Capacity Building programme(s) by accredited private provider(s).

It is envisaged that the project deliverables will be addressed through the utilisation of existing APPETD member provider(s) in good standing.

1. Introduction

APPETD is seeking a training provider with a proven track record of delivering high level training on Effective Strategic Management. This is a non-credit bearing programme aimed at senior management and management of the private provider institutions.

The training provider must have accreditation with the ETDP SETA irrespective of this being a non-credit bearing programme.

A) Effective Strategic Management Programme

Objective of the Effective Strategic Management Programme:

Strategic Management is the stream of decisions and actions to achieve the corporate objectives. A strategic plan is a practical action-orientated guide, based on an examination of internal and external factors, which direct goal setting and resource allocation to achieve meaningful results over time.

Outcomes:

- Outcome 1: Develop a strategy for the institution/division/section.
- Outcome 2: Develop action plans for the institution/division/section.
- Outcome 3: Implement action plans.
- Outcome 4: Review action plans.
- Outcome 5: Develop operational strategies for a unit.
- Outcome 6: Develop an operation plan for a unit.
- Outcome 7: Prepare, implement, monitor and measure an operational plan.
- Outcome 8: Values, ethics and organisational culture and its impact.

- Outcome 9: Analyse and apply the concept of corporate ethics.
- Outcome 10: Formulate recommendations for strengthening shared organisational values, the code of conduct and ethical practices.

In the design of the project the provider can be guided by the learning outcomes contained in unit standards:

- 15219 – Develop and implement a strategy and action plans for a team, department or division.
- 252032 – Develop, implement and evaluate an operational plan
- 252042 – Apply the principles of ethics to improve organisational culture

A formal assessment, conducted by the training provider, for this Effective Strategic Management programme is **compulsory** to ensure a measurement of competency.

2. Profile of the training provider

A) ACCREDITATION

1. The Training Provider must provide confirmation of accreditation with the ETDP SETA irrespective of this being a non-credit bearing programme.
2. The Training Provider must have a proven track record of at least 3 years in Effective Strategic Management training and capacity building conducted successfully.
3. The Training Provider must provide confirmation of accredited facilitator, assessor and moderator.
4. The Training Provider must be financially sustainable to complete the key deliverables of this programme as set out in this Terms of Reference.

B) PROOF OF SIMILAR PROJECTS

1. The Training Provider must provide an indication of similar projects undertaken in the past three years, indicating the scope, completion, and success rates per project.
2. The Training Provider must provide a minimum three (3) contactable references regarding prior training programmes conducted.

3. Learner Entry requirements/ Pre-requisites

The Training Provider must confirm awareness of and adherence to the following:

- Beneficiaries must be employed within the ETD sector.
- Beneficiaries must be proficient in English at NQF level 4 (Grade 12)

4. Scope of Work

A) FACILITATION AND ASSESSMENT

1. Facilitate this Effective Strategic Management programme utilising an in-person learning platform i.e., face to face and manage submission of assessments requirements.
2. Design and develop training materials.
3. Provide participants with appropriate training and reference materials adapted to an in-person learning platform format.
4. Printing of all training related materials and certificate of attendance/competence.
5. Provide learner support to ensure learners achieve competency in the programme.
6. Ensure and provide signed attendance registers and learner registration documentation as evidence of attendance and completion of training.
7. Identify and assist learners with special educational and training needs.
8. Monitor and evaluate internal moderation processes.
9. Design, develop assessment tools and assess participants.
10. Issue certificates of competence and/or Statements of Results of the Effective Strategic Management programme.
11. Provide and arrange all logistical needs i.e., venue, catering etc.

B) PLANNING AND SUPPORT

1. Prepare training reports as part of key deliverables on conclusion of training and on completion of assessment.
2. Prepare an implementation plan for the Effective Strategic Management programme indicating time frames, project staff, budget, in person learning platform to be used and contingency plans.
3. A budget indicative of training provider's financial stability and ability to complete project successfully as per key deliverables and timeframes.
4. **The training provider must be able to start *training* on 27 March 2023 and conclude *training* on the 29 March 2023.**

5. Costing Model

A) CAPACITY BUILDING PROGRAMME(s) 2023: THIS COSTING MODEL MUST BE COMPLETED IN THIS FORMAT.

NUMBER OF LEARNERS INDICATED:	66
PROVINCE(s):	Gauteng face to face Learning Platform
NUMBER OF CREDITS:	Non-credit bearing
TOTAL MODULES:	3
NON-UNIT STANDARD CAPACITY BUILDING PROGRAMME	
NUMBER OF TRAINING DAYS:	3

ITEM DESCRIPTION	NO. OF LEARNERS	UNIT COST	AMOUNT	COMMENTS
Tuition/Training Fee				
• Facilitation	66			
• Training Material	66			
• Assessment	66			
• Moderation	66			
SUB- TOTAL (zero rated)				
In person methodology	66			
Data usage	66			
Certification	66			
Travel-related costs				Indicate breakdown
SUB-TOTAL				
Admin Internal Expenses				Not exceeding 7.5% of total project value
TOTAL COSTS				
	66	R	R	Max. cost Per Learner
THE FINAL AMOUNT MUST BE BETWEEN R950 000 AND R1 000 000, WHICH MUST INCLUDE THE 30% PAYABLE TO APPETD.				

An Expression of Interest covering letter is required, along with the items listed below.

6. Evaluation Criteria

THE APPETD applies the provisions of the PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, ACT NO 5 OF 2000 and Preferential Procurement Regulations, 2017.

6.1 STAGE 1

Entails the submission of **mandatory documents required to be eligible for evaluation.**

1. Covering Letter and description/profile of the organisation
2. ETDP SETA Accreditation Certificate
3. Original valid Tax Clearance Certificate or Unique security personal identification number (PIN) issued by SARS" – SBD 2
4. Declaration of Interest – SBD 4
5. Declaration of Bidder's Past Supply Chain Practices – SBD 8
6. Certificate of Independent Bid Determination – SBD 9
7. CIPC registration documents
8. Certified copies of IDs of shareholders/directors, this must **not be older than 3 months.**
9. Central Supplier Database Registration Report
10. Proof of APPETD Membership
11. APPETD Members that received APPETD/ETDP SETA Funding in the past 12 months do not qualify.

Note: Documents are to be certified with an **original stamp**, which has a date of certification on it. Three (3) months in case of the certified identity documents, and one (1) year in case of the other documents. The person signing as the Commissioner of Oaths must not have any family relationships with the bidder/s.

NB: Failure to submit any of the above documents will lead to disqualification.

6.2 STAGE 2

The evaluation of each bid shall be based on criteria as specified. The minimum qualifying score for acceptable functionality will be **70 points** and bids that fail to achieve this minimum qualifying score will be eliminated. Points will be awarded on a sliding scale.

Please see evaluation table below.

ITEM	QUALIFYING CRITERIA FOR SHORT LISTING	MAX. POINTS
1.	Proof of similar projects and references to be provided. <ol style="list-style-type: none"> a. Contactable references x 3 = 15 b. Experience in successful running similar projects <ul style="list-style-type: none"> ○ 5 years or more = 10 ○ 3 - 4 years = 6 ○ 1 - 2 years = 3 	25
2.	Project plan for the delivery of the programme. <ol style="list-style-type: none"> a. Structure of the programme in terms of the outcomes to be achieved (70/30) = 5 b. Method and delivery of program = 20 c. Method of assessment = 5 d. Learner support plan = 5 	35

3.	Profiles/CVs of key staff to be attached. a. Project Management structure indicated = 5 b. Relevant experience managing similar projects (+3yrs preferred) of experience = 5 c. Facilitators (relevant experience facilitating the learning programme) = 10	20
4.	Proof of training resources available and the infrastructural resources of the organization. Proof of financial viability to successfully complete deliverables	5 15
TOTAL		100

6.3 STAGE 3

The APPETD BEC Committee will evaluate the shortlisted bids. Please take note of the value and scoring point system of your proposed bid.

80/20 preference point system shall be applicable in the following bids:

- Price 80
- Preferential points 20
- Completed and Signed Covering letter/ Invitation to Bid - **SBD1**
- Signed budget/pricing schedule. Failure to submit a signed budget/pricing schedule will result in the committee accepting the submitted price as the final bid(s).

7. Bid Conditions

The APPETD Supply Chain Management Policy will apply:

1. APPETD does not bind itself to appoint a bidder with the highest points.
2. APPETD reserves the right to cancel the bid and not award the bid to any of the bidders.
3. Bids which are late, incomplete, and unsigned will not be accepted.
4. Bidders with a turnover above R 10 million must submit a valid certified B-BBEE Verification Certificate from SANAS Accredited Verification Agency to be eligible for empowerment points.
5. B-BBEE Certificates obtained from Accountants/ Auditors will be accepted.
6. An Exempted Micro Enterprise (EME) is only required to submit an affidavit, or a Certificate issued by Companies and Intellectual Property Commission (CIPC) confirming annual turnover of R 10 million or less and level of black ownership to claim points.
7. Companies who bid as a joint venture must submit a consolidated B-BBEE Verification certificate prepared for this bid only, from SANAS Accredited Verification Agency to be

eligible for empowerment points. Companies who form part of this joint venture **MUST** have an accreditation certificate with relevant authority as stated in Mandatory documents.

8. Failure to submit a valid certified B-BBEE Certificate or, in the case of EMEs, an affidavit and the accompanying fully completed and signed Standard Bidding Document (SBD 6.1) will result in the bidder not qualifying for claiming preferential points.
9. Bids submitted are to hold good for a period of 90 days.
10. Deregistered and blacklisted companies including directors/owners/individuals linked to the company will not be considered. Due diligence will be conducted with successful bidders to validate submitted information.
11. All bids must first meet the pre-qualification criteria to be considered for evaluation
12. Companies that are in the process of de-registration in the CIPC will not be considered.
13. Service Providers must provide proof of Public Liability Insurance.
14. APPETD reserves the right to appoint a service provider/s of its choice should submissions received prove to be inadequate or fail to meet the criteria set.

7. Submission of bids

Bid documents must be emailed to admin@appetd.org.za by **11h00, Tuesday, 14 March 2023.**

Late submissions will not be considered.

Approved by:

Witness:



Cynthia Reynders: CEO



Nadia Potgieter: Operations Manager