

FOR THE IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DESIGN AND DELIVERY OF A TRAINING PROGRAMME ON THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS

---



National Treasury  
REPUBLIC OF SOUTH AFRICA

---

## TERMS OF REFERENCE

FOR THE IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DESIGN AND DELIVERY OF A TRAINING PROGRAMME ON THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS

PN 1027

---

## BACKGROUND INFORMATION

### Programme Identification

<b>Tender reference:</b>	GTAC 014-2020-21
<b>Contracting authority</b>	Government Technical Advisory Centre (GTAC), National Treasury
<b>Project work stream</b>	MFIP III: Municipal Finance Management Minimum Competency Training
<b>Purpose</b>	Training to build the capacity of National and Provincial Treasury officials on the MFMA regulated minimum competency levels.

**Contents**

- 1 PURPOSE OF THESE TERMS OF REFERENCE ..... 1**
- 2 RESTRICTIONS ..... 1**
- 3 BACKGROUND INFORMATION ..... 2**
  - 3.1 General ..... 2
  - 3.2 Office of the Accountant-General (OAG) ..... 2
  - 3.3 Background to MFIP III ..... 3
  - 3.4 Municipal Regulations on Minimum Competency Levels ..... 4
- 4 SCOPE OF WORK ..... 5**
  - 4.1 Overall Objective ..... 5
  - 4.2 Specific Objectives ..... 6
- 5 DELIVERABLES AND TIMEFRAMES ..... 8**
  - 5.1 Expected deliverables from the project ..... 8
  - 5.2 Project timelines ..... 8
- 6 SKILLS AND EXPERTISE REQUIRED ..... 9**
  - 6.1 Key experts ..... 9
  - 6.2 Non-key experts (Support staff & backstopping) ..... 10
- 7 STRUCTURE AND CONTENTS OF BID PROPOSAL ..... 10**
- 8 SUBMISSION REQUIREMENTS ..... 11**
  - 8.1 Minimum requirements from the bidder(s) ..... 11
- 9 EVALUATION OF BIDS ..... 12**
- 10 GENERAL REQUIREMENTS ..... 14**
  - 10.1 Period and level of effort ..... 14
  - 10.2 Limitations of Assistance ..... 14
- 11 MONITORING, EVALUATION AND REPORTING ..... 15**
  - 11.1 Project monitoring and evaluation ..... 15
  - 11.2 Contractor Reporting Requirements ..... 15
- 12 CONTRACTUAL CONDITIONS ..... 16**
  - 12.1 Contracting authority ..... 16
  - 12.2 Contract fees ..... 16
  - 12.3 Intellectual property rights ..... 16
- 13 BID VALIDITY PERIOD ..... 16**

## 1 PURPOSE OF THESE TERMS OF REFERENCE

- 1.1. GTAC is seeking highly qualified, skilled, and experienced LGSETA accredited training providers to provide MFMA regulated minimum competency level training for approximately 100 officials who are placed at the National Treasury (NTs) as well as various Provincial Treasuries (PTs) across the country.
- 1.2. These terms of reference detail the general and specific qualifications, skills and experience requirements, the work that will be expected to be performed as well as other relevant contractual and working arrangements that will apply.
- 1.3. Offers will be accepted from bidders that propose to provide appropriate resources for this work. The basis for the evaluation will, *inter alia*, be a combination of the qualifications, skills, and experience of contractors.
  - Section 2 of this document outlines the restrictions applicable to this bid.
  - Section 3 sets out background information on GTAC, the OAG, MFIP III and the MFMA municipal regulations on minimum competency levels.
  - Sections 4 - 8 sets out the scope of the project and overall objectives; deliverables and timeframes of the project; the skills and expertise required; the guidelines on the structure and contents of the proposal; and minimum requirements from bidders.
  - Section 9 sets out the criteria that will be used to evaluate the functionality of bids.
  - Sections 10 - 13 outline general requirements expected from service providers, monitoring, evaluation and reporting requirements, important contractual conditions that will apply to successful bidders and the bid validity period.

## 2 RESTRICTIONS

- 2.1. CVs from persons in the service of the State<sup>1</sup> will not be considered for this assignment.
- 2.2. Only LGSETA accredited training providers shall be considered for this assignment.

<sup>1</sup>State means –

- a) Any national or provincial department, national or provincial public entity or constitutional institution within the meaning of Public Finance Management Act, 1999 (Act No. 1 of 1999)
- b) Any municipality or municipal entity.
- c) Provincial Legislature
- d) National Assembly or The National Council of Provinces, or
- e) Parliament

### **3 BACKGROUND INFORMATION**

#### **3.1 General**

3.1.1 GTAC is an agency of National Treasury, established to provide advisory services, programme management and transaction support across all spheres of government. Its central mandate is to assist organs of state in building capacity for efficient, effective, and transparent public finance management and in implementing high-impact government initiatives.

3.1.2 GTAC contributes to public finance management capacity development and knowledge sharing by:

- (a) Promoting collaborative and innovative approaches to service delivery challenges, in collaboration with partner institutions;
- (b) Developing and adapting methodologies and tools designed to meet government and public-sector management requirements;
- (c) Communicating and publishing evaluation reports, case studies and research papers; and
- (d) Public finance professional development.

3.1.3 GTAC implements its mandate through a client-focused and project-based approach and collaborates with partners inside and outside government in the development and delivery of its services.

3.1.4 GTAC has been appointed by the Office of the Accountant General to appoint accredited training provider/s to train officials from national and provincial treasuries as part of phase III of the Municipal Finance Improvement Programme (MFIP).

#### **3.2 Office of the Accountant-General (OAG)**

3.2.1 The OAG promotes and enforces transparency and effective management in respect of revenue expenditure, assets, and liabilities of institutions in all three spheres of government. This includes the administration of the National Revenue Fund (NRF), the Reconstruction and Development Programme Fund (RDPF), and Banking Services (BS) for national departments. The OAG is also responsible for developing policies and frameworks on accounting, internal audit and risk management.

3.2.2 Through its capacity development unit, the OAG is committed to building capacity for sound and transparent financial management, across all three spheres of government.

### **3.3 Background to MFIP III**

- 3.3.1 As a result of the persistent poor performance of municipalities over the past fifteen years, numerous support programmes and interventions have been initiated by both national and provincial governments in an effort to improve the capacity of local government, address inadequate service delivery issues, and enhance good governance through improved accountability and transparency.
- 3.3.2 The Municipal Finance Improvement Programme is incorporated into the National Treasury (NT) Strategic Plan, and currently institutionalised within the NT, in the Office of the Accountant-General (OAG). The overall strategic goal of the programme is to facilitate improvements in the management of the financial affairs of municipalities, and to facilitate effective implementation of the Municipal Finance Management Act (MFMA), Act 56 of 2003.
- 3.3.2 The MFIP supports Pillar 3, Priority 6 of Government's Medium-Term Strategic Framework (MTSF: 2019 – 2024), in building a capable, ethical and developmental State as it relates to outcome 2, i.e. functional, efficient and integrated government.
- 3.3.3 The MFIP III, which commenced on 1 April 2017 and ended on 31 March 2020, is a strategically driven programme of technical assistance aligned to the six LGFM game changers, designed to build the institutional and technical financial management capacity of NT, PTs and Municipalities. This is mainly achieved through the placement of Technical Advisors (TAs) within the MFMA support units of provincial treasuries, and the Budget and Treasury Office (BTO) of municipalities.
- 3.3.3 The Director-General approved a two-year extension of the MFIP III, to be called MFIP IIIx, which will commence on 01 April 2020. Several modifications have been made to the operating modalities of the MFIP during phase III which intended to bolster the programmes overall effectiveness and efficiency.
- 3.3.4 The processes included strengthening the institutionalisation of the modified MFIP business model; ongoing elucidation and advocacy of the revised governance and management arrangements with programme stakeholders; sourcing of technical advisors to implement the entire spectrum of MFIP technical support to programme beneficiaries in NT, PTs and municipalities; and implementing the MFIP Knowledge Information Management strategy to ensure increased efficiency in programme administration and enhanced knowledge sharing and collaborative learning across the project work streams.

3.3.5 The MFIP IIIx operating model is set out in the figure below and illustrates the alignment of the integrated project work streams to the six LGFM game changers. It further shows the three modalities of providing direct institutional and technical capacity support to selected NT divisions, PT municipal finance units and the BTOs of identified municipalities

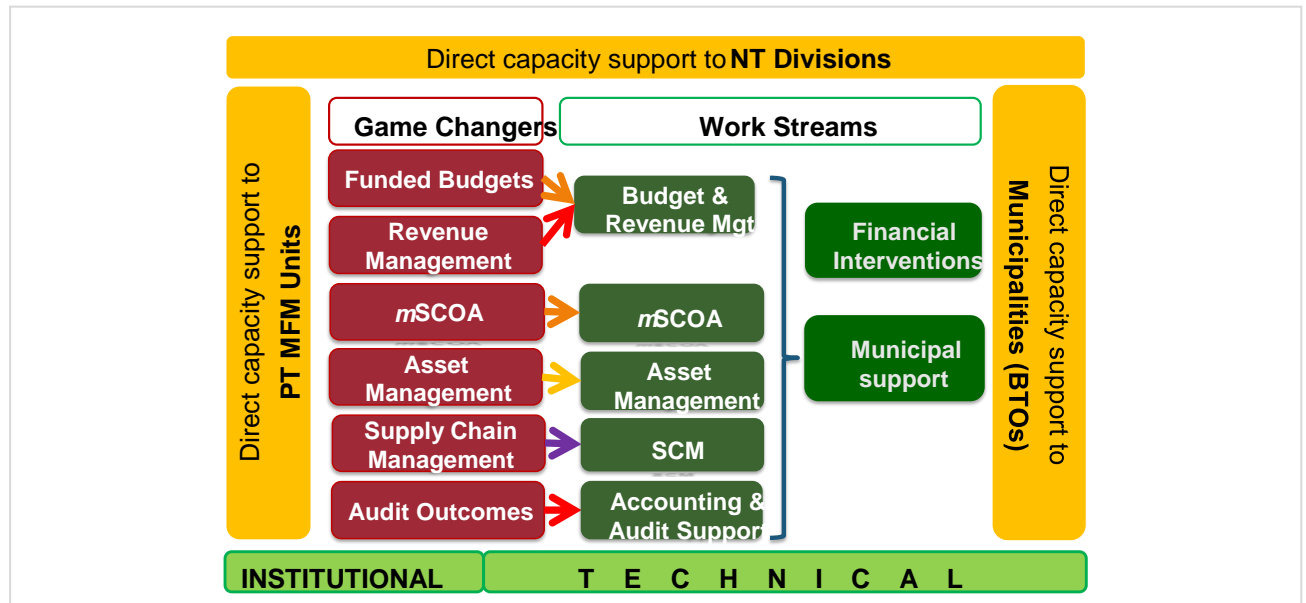


Figure 1: MFIP Operating Model

3.3.6 The MFIP Programme Management Unit (PMU) is responsible for providing the overall strategic leadership, oversight, management, and support required for the successful implementation of the Municipal Finance Improvement Programme. This include:

- (a) Preparing the overall work programme;
- (b) Managing the budget, formulating the scope of work, and executing specific project objectives; and
- (c) Managing, monitoring, and evaluating the performance of all resources, policies, and programme implementation.

3.3.7 The PMU is led by a Chief Director who is supported by Directors and other Project Support officials. The MFIP also works in close consultation with relevant NT Chief Directorates to ensure coherence of policy implementation and specialist support and the co-development of initiatives, tools and systems that can be used to strengthen overall improvements in the local government financial management space.

### 3.4 Municipal Regulations on Minimum Competency Levels

3.4.1 In terms of the Municipal Regulations on Minimum Competency Levels, as published under Government Gazette number 29967 dated 15 June 2007, municipalities need to ensure that specific training is provided to their officials.

---

**PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS**

3.4.2 These regulations were due on the 1 January 2013 for full compliance. The regulations stipulate the minimum competency levels required for Municipal Managers, Chief Financial Officers, Heads of Supply Chain Management, Senior Managers, Managers and Middle Managers tasked with financial management responsibilities. Following the issuing of the Municipal Regulations on Minimum Competency Levels, a set of guidelines for implementing the regulations on minimum competency levels was issued on 1 July 2007.

3.4.3 The due date for full compliance was extended through the MFMA Exemption Notice to 30 September 2015. In spite of the efforts by National Treasury to afford municipalities an opportunity to comply, the compliance levels still remain very low.

3.4.4 The following is provided for in the Municipal Regulations on Minimum Competency Levels:

- (a) Chapter 2 provides for the minimum competency levels that an accounting officer of a municipality must comply with in relation to levels of higher education qualification, work related experience, core managerial competencies, and sets out the relevant and required unit standards.
- (b) The required unit standards for Chief Financial Officers are set out in Chapter 3;
- (c) Chapter 4 provides same for Senior Managers,
- (d) Chapter 5 also provides the required unit standards for Financial Officials at Middle Management Level, and
- (e) Chapter 6 outlines the same for Heads of Supply Chain Management Units, Supply Chain Managers, as well as supply chain officials.

3.4.5 GTAC on behalf of the National Treasury has extended the training on identified unit standards on minimum competency levels to cover approximately 100 national and provincial treasury officials, who are not necessarily obligated to meet such requirements, but for the purpose of strengthening their monitoring, support and oversight functions related to municipalities.

3.4.6 This ToR is primarily for LGSETA accredited training providers who will be required to conduct minimum competency training at the central locations listed in Table 1 below.

## **4 SCOPE OF WORK**

### **4.1 Overall Objective**

4.1.1 To design and deliver an accredited training programme, supporting the MFMA minimum competency levels for approximately 100 national and provincial treasury officials,

**IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DELIVERY OF A TRAINING PROGRAMME UNDER THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND**

**PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS**

responsible for monitoring and supporting local government financial management affairs, at the locations specified in Table 1 below or as agreed by the parties.

**4.1.2 Service providers must clearly indicate in their proposed project implementation plan for which locations they are submitting their bids as per the below table. The final number of nominated officials per province will be confirmed at the inception meeting:**

*Table 1: List of provinces and provisionally nominated officials*

<b>Province</b>	<b>Number of officials</b>
Eastern Cape (Bhisho)	14
Free State (Bloemfontein)	7
Gauteng (Pretoria – 27 NT officials) (Johannesburg – 2 GPT officials)	29
Kwa-Zulu Natal (Pietermaritzburg)	5
Limpopo (Polokwane)	12
Northern Cape (Kimberley)	16
North West (Mahikeng)	17
<b>Total</b>	<b>100</b>

## **4.2 Specific Objectives**

- 4.2.1 To facilitate training for nominated NT and PT officials over a 12-month programme on the unit standards specified in table 2 below, which form part of the NQF Level 6 Certificate in Municipal Financial Management (SAQA Qualification ID: 48965);
- 4.2.2 To assess officials in line with the formative and summative assessment process through the compilation of Portfolio of Evidence;
- 4.2.3 To moderate the assessment achievement in line with the policy directive of the institution;
- 4.2.4 To provide the necessary remedial support on assessment;
- 4.2.5 To invite the Local Government Sector Education and Training Authority (LGSETA) for the verification of Quality Assurance of Learner Achievement;



**IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DELIVERY OF A TRAINING PROGRAMME UNDER THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND**

**PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS**

4.2.6 To upload the successful learner results as soon as the LGSETA has endorsed the outcomes;

4.2.7 To issue learners with Statement of Results showing progress in their achievement; and

4.2.8 The MFMA minimum competency training programme should thus include at least the following fundamental, core and elective unit standards shown in table 2 below.

4.2.9 It must be noted that the successful service providers will be required to confirm the actual number of unit standards that nominated officials will undertake/enrol.

*Table 2: Unit standards, description and NQF level*

<b>Unit Standard</b>	<b>Description of Unit Standard</b>	<b>NQF Level</b>	<b>Credits</b>
<b>Municipal legislation and policy implementation</b>			
<a href="#">116361</a> Elective	Interpret South African legislation and policy affecting municipal financial management	6	8
<a href="#">116344</a> Core	Apply the Inter-governmental Fiscal Relations Act to municipal financial management	6	10
<b>Stakeholder consultations and ethics in a municipal context</b>			
<a href="#">116348</a> Fundamental	Conduct stakeholder consultations around municipal finance	6	8
<a href="#">116343</a> Fundamental	Apply the principles of ethics in a municipal environment	6	10
<b>Municipal planning and budgeting</b>			
<a href="#">116538</a> Core	Contribute to the strategic planning process in a South African municipality	6	15
<a href="#">116345</a> Core	Apply the principles of budgeting within a municipality	5	15
<a href="#">116364</a> Core	Plan a municipal budgeting and reporting cycle	6	8
<a href="#">116342</a> Core	Apply approaches to managing municipal income and expenditure within a multi-year framework	6	15
<a href="#">116340</a> Core	Apply costing principles to municipal operational and service-based costing	6	11
<a href="#">116347</a> Core	Apply capital planning and financing	6	15
<b>Municipal financial management and reporting</b>			
<a href="#">116363</a> Core	Prepare and analyse municipal financial reports	6	12
<a href="#">116346</a> Core	Apply techniques and South African statutes to cash and investment management in a municipal environment	6	10

**IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DELIVERY OF A TRAINING PROGRAMME UNDER THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND**

**PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS**

<a href="#">116362</a> Core	Manage a municipality's assets and liabilities	6	11
<a href="#">116353</a> Core	Participate in the design and implementation of municipal supply chain management	6	12
<b>Auditing and risk management in a municipal context</b>			
<b>Unit Standard</b>	<b>Description of Unit Standard</b>	<b>NQF Level</b>	<b>Credits</b>
<a href="#">116351</a> Elective	Conduct auditing planning and implementation in a South African municipality	5	12
<a href="#">116357</a> Elective	Design internal control and internal control evaluation framework	6	8
<a href="#">116339</a> Core	Apply risk management in South African municipalities	6	10

## **5 DELIVERABLES AND TIMEFRAMES**

### **5.1 Expected deliverables from the project**

The following minimum deliverables from the project are expected:

- 5.1.1 Inception Report, outlining amongst others a detailed approach, methodology and project implementation plan.
- 5.1.2 Quality Management System/Plan for the facilitation, assessment, moderation and internal and external verification process.
- 5.1.3 Monthly progress reports against the project implementation plan to be submitted and presented to the MFIP PMU and/or Project Reference Group (PRG);
- 5.1.4 A PowerPoint or audio-visual presentation of the learner results, POE submission rates and QALA assessment findings and recommendations.
- 5.1.5 A project close-out report detailing amongst others the work against the approved project implementation plan, overall successes and failures, lessons learned, recommendations for future projects of this nature, etc.

All reports shall be written in English and all reports, files, notes, electronic files, and documents shall be structured, formatted, and completed according to the requirements as agreed with the MFIP PMU.

### **5.2 Project timelines**

- 5.2.1 The indicative timeframe for the design and delivery of the accredited training is twelve (12) months in total, including non-billable time. The project is expected to start around the beginning of October 2020.

5.2.2 The service provider should produce the activity-based project plan indicating the milestones against the deliverables in the table below.

*Table 2: Indicative Project Milestones and Payment Schedule*

Milestone/Deliverable	Milestone/Delivery Date	% payment
Indicative Start Date and Inception Briefing Meeting	09 October 2020	
Approved Inception Report	23 October 2020	5%
Service Provider contract and SLA signed	30 October 2020	
Monthly Progress/Monitoring Report (reports are due by the 5 <sup>th</sup> working day of the month)	07 December 2020 – 05 October 2021	11 invoices @ 7% each
Draft Close Out Report	15 September 2021	5%
Submission of POE Results	05 October 2021	5%
Presentation and approval of close-out training report (approval by MFIP Steering Committee)	29 October 2021	8%

## 6 SKILLS AND EXPERTISE REQUIRED

### 6.1 Key experts

Key experts are critical in successfully implementing an assignment of this nature given the diverse unit standards to be rolled out to learners. The bidder should specify the number of key experts expected to be part of the project team, their areas of expertise and their respective responsibilities. Inclusion of at least lead facilitators, constituent assessors and constituent moderators are required. The key experts must possess the minimum relevant qualifications and professional experience, as specified below. The CVs for the following key experts required for this assignment should be submitted by the bidder:

#### 6.1.1 Lead Facilitators

- (a) The experts should have a recognised post-graduate degree or equivalent qualification in preferably financial management, Public Financial Management, Accounting and/or a field related to this assignment.
- (b) Further, lead facilitators should have at least 8 years' working experience in the facilitation of LGSETA accredited learning programmes.

#### 6.1.2 Constituent Assessors

- (a) The experts should have a recognised degree or equivalent qualification in preferably financial management, Public Financial Management, Accounting and/or a field related to this assignment.

PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS

- (b) Registration of this category of key experts with the LGSETA as Constituent Assessor is a mandatory requirement.
- (c) In addition, constituent assessors should have no less than 5 years' working experience in the facilitation, assessment and moderation of LGSETA accredited learning programmes.

### 6.1.3 Constituent Moderators

- (a) The experts should have a recognised degree or equivalent qualification in preferably financial management, Public Financial Management, Accounting and/or a field related to this assignment.
- (b) Registration of this category of key experts with the LGSETA as Constituent Moderators is a mandatory requirement.
- (c) In addition, the constituent moderators should have no less than 5 years' working experience in the facilitation, assessment and moderation of LGSETA accredited learning programmes.

## 6.2 Non-key experts (Support staff & backstopping)

6.2.1 The bidder should indicate the role of additional non-key experts.

6.2.2 Each non-key expert should have a recognised qualification in project administration/management, public administration/management, business administration/management, training and development, with no less than 5 years' experience in project management and/or office administration preferably in a training and development organisation or public administration environment.

6.2.3 Backstopping and support staff costs shall be included in the bidder's pricing proposal.

6.2.4 CVs for non-key experts should be submitted by the bidder.

## 7 STRUCTURE AND CONTENTS OF BID PROPOSAL

The structure and minimum contents of the bid proposal required from bidders is shown in Table 4 Below. The bidder must provide the following minimum information linked to the functionality evaluation criteria depicted in Table 5 below.

*Table 4: Structure and Contents of Bid Proposal*

	<b>Minimum contents of bid proposal</b>
--	---

**IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DELIVERY OF A TRAINING PROGRAMME UNDER THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND**

**PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS**

1.	An activity-based project implementation plan (including effort for different team members per activity and time frame linked to activities – it is important that effort levels for all proposed resources are clear) with a methodology that clearly outlines the overall strategy and approach for implementation while demonstrating an understanding of the SAQA and LGSETA requirements in terms of quality management, assessment and moderation processes. The plan must outline the measures to be put in place to ensure that the Quality Assurance of Leaner Achievement (QALA) are met.
<b>Minimum contents of bid proposal</b>	
2.	Profile of the service provider including organisational competencies and experience relevant to this assignment (include list of clients with officials who received <u>related</u> training, clearly indicating the role of the service provider with contact details of references).
3.	Detailed activity-based budget (in South African Rand, including VAT)
4.	Team (team members, expertise, roles and level of effort for each member of the team); Competencies of team members (include list of related projects undertaken (nature and size, clearly indicating the role of the team member with contactable references)
5.	Attachments: <ul style="list-style-type: none"> <li>• CVs of key personnel and <b>certified</b> copies of educational qualifications not older than 6 months.</li> <li>• Completed standard bidding documents attached herewith (as per information to bidders)</li> </ul>

## **8 SUBMISSION REQUIREMENTS**

### **8.1 Minimum requirements from the bidder(s)**

**Bidders must submit a responsive proposal in accordance with these terms of reference.**

8.1.1 Bidders must submit a responsive proposal in accordance with these terms of reference and the minimum requirements outlined under sections 6 and 7 above.

8.1.2 Bidders must provide certified proof of educational qualifications for all key and non-key experts not older than 6 months. All international qualifications must be accompanied by a South African Qualifications Authority (SAQA) accreditation certificate.

8.1.3 Certificate of membership to professional bodies will not be considered if not accompanied by certified educational qualifications.

8.1.4 Certified proof of registration with the LGSETA as assessors and moderators for the specified key experts shall be submitted.

8.1.5 Non-submission of certified educational qualifications, SAQA accreditation (where applicable) and proof of LGSETA registration will lead to disqualification.

8.1.6 Bidders must provide a certified copy of their valid LGSETA accreditation certificate. Bidders who are not currently accredited as a training provider by the LGSETA will be disqualified.

**Failure by a bidder to comply with the above minimum requirements will result in such Bidder's proposal not being evaluated further.**

## **9 EVALUATION OF BIDS**

- 9.1. Only bids that comply with all the administrative requirements (as specified in the information to bidders) will be considered during the functionality evaluation stage.
- 9.2. Bid proposals should clearly address the functionality evaluation criteria outlined in table 5 below. Table 5 depicts the evaluation criteria, scoring system and weight allocation that will be used for the functionality evaluation of bids that meet all the stated administrative compliance requirements.
- 9.3. Only bidders who score a minimum of 70% for the functionality evaluation will be considered for the Preferential Procurement Policy Framework Act (PPPFA) evaluation as articulated in the information to bidders.
- 9.4. The GTAC reserves the right to call bidders who meet the minimum functionality evaluation requirements to present their proposals to the Bid Evaluation Committee (BEC).

**IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DELIVERY OF A TRAINING PROGRAMME UNDER THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND**

**PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS**

*Table 5: Functionality evaluation criteria, scoring and weight*

No.	EVALUATION CRITERIA	SCORING	WEIGHT
<b>1.</b>	<b>PROJECT IMPLEMENTATION PLAN (PIP)</b>		<b>30</b>
	<p>The PIP Methodology clearly outlines the following elements:</p> <ul style="list-style-type: none"> <li>• Overall strategy and approach to ensure that this assignment is delivered according to specifications within the given 12-month timeline.</li> <li>• Understanding of the SAQA and LGSETA requirements.</li> <li>• Assessment process and methodology.</li> <li>• Moderation process and methodology.</li> <li>• Remedial support process.</li> <li>• Understanding of the LGSETA quality management and related verification processes.</li> <li>• Quality Assurance of Learner Achievement (QALA) measures.</li> <li>• Project monitoring and evaluation plan</li> </ul>	<p>1= Only three and below of the specified elements of the PIP addressed</p> <p>2= Addressed four of the specified elements of the PIP</p> <p>3= Addressed five of the specified elements of the PIP</p> <p>4= Addressed six of the specified elements of the PIP.</p> <p>5= Addressed seven or more of the specified elements of the PIP. Further, some additional innovative approaches and methodologies proposed to facilitate the training delivery likely to increase the use/value of the training.</p>	30
<b>2.</b>	<b>QUALIFICATIONS</b>		<b>30</b>
<b>2.1</b>	<p><b>Lead Facilitators'</b> highest educational qualification obtained in:</p> <ul style="list-style-type: none"> <li>• Financial management,</li> <li>• Public financial management,</li> <li>• Accounting</li> <li>• or related field</li> </ul>	<p>5 = Masters (NQF9) or higher</p> <p>4 = Honours degree (NQF8)</p> <p>3 = Degree (NQF7)</p> <p>2 = National diploma (NQF6)</p> <p>1 = Higher certificate (NQF5)</p>	10
<b>2.2</b>	<p><b>Constituent Assessors'</b> highest educational qualification obtained in:</p> <ul style="list-style-type: none"> <li>• Financial management,</li> <li>• Public financial management,</li> <li>• Accounting</li> <li>• or related field</li> </ul>	<p>5 = Honours degree (NQF8) or higher;</p> <p>4 = Degree (NQF7)</p> <p>3 = National diploma (NQF6)</p> <p>2 = National certificate (NQF5)</p> <p>1 = Matric certificate (NQF4)</p>	10
<b>2.3</b>	<p><b>Constituent Moderators'</b> highest educational qualification obtained in:</p> <ul style="list-style-type: none"> <li>• Financial management,</li> <li>• Public financial management,</li> <li>• Accounting</li> <li>• or related field</li> </ul>	<p>5 = Honours degree (NQF8) or higher;</p> <p>4 = Degree (NQF7)</p> <p>3 = National diploma (NQF6)</p> <p>2 = National certificate (NQF5)</p> <p>1 = Matric certificate (NQF4)</p>	10
<b>3.</b>	<b>GENERAL EXPERTISE</b>		<b>40</b>
<b>3.1</b>	<p><b>Lead Facilitators:</b></p> <p>Number of years' experience in facilitating, assessing and moderating SETA accredited training and development programmes.</p>	<p>5 = more than 10 years</p> <p>4 = more than 7 and up to 10 years</p> <p>3 = more than 5 and up to 7 years</p> <p>2 = more than 3 and up to 5 years</p> <p>1 = 0 and up to 3 years</p>	10

**IDENTIFICATION OF ACCREDITED TRAINING PROVIDERS TO FACILITATE THE DELIVERY OF A TRAINING PROGRAMME UNDER THE MFMA REGULATED MINIMUM COMPETENCY LEVELS FOR APPROXIMATELY 100 NATIONAL AND**

**PROVINCIAL TREASURY OFFICIALS ON IDENTIFIED UNIT STANDARDS**

<b>No.</b>	<b>EVALUATION CRITERIA</b>	<b>SCORING</b>	<b>WEIGHT</b>
<b>3.2</b>	<b>Constituent Assessors:</b> Number of years' experience in facilitating, assessing and moderating SETA accredited training and development programmes.	5 = more than 7 years 4 = more than 5 and up to 7 years 3 = more than 3 and up to 5 years 2 = more than 1 and up to 3 years 1 = less than 1 year	10
<b>3.3</b>	<b>Constituent Moderators:</b> Number of years' experience in facilitating, assessing and moderating SETA accredited training and development programmes.	5 = more than 7 years 4 = more than 5 and up to 7 years 3 = more than 3 and up to 5 years 2 = more than 1 and up to 3 years 1 = less than 1 year	10
<b>3.4</b>	<b>Support staff:</b> Number of years' experience in project management and/or office administration preferably in a training and development or public administration environment.	5 = more than 7 years 4 = more than 5 and up to 7 years 3 = more than 3 and up to 5 years 2 = more than 1 and up to 3 years 1 = less than 1 year	10
<b>TOTAL</b>			<b>100</b>

## **10 GENERAL REQUIREMENTS**

### **10.1 Period and level of effort**

10.1.1 The assignment must be completed within a period of 12 months from date of commencement unless otherwise agreed by the parties;

10.1.2 It is expected that the service providers will be available to discuss on-going requirements of the assignment at any time either telephonically or in person. Moreover, the service provider will be required to report to the GTAC-NT offices at agreed intervals to engage with the PMU and other programme stakeholders; and

10.1.3 The project will be coordinated through the MFIP III Programme Management Unit, located at 240 Madiba Street Pretoria.

### **10.2 Limitations of Assistance**

The service providers contracted by GTAC through this tender process:

10.2.1 Have no authority or signing powers to bind GTAC unless otherwise provided for in the contract or service level agreement concluded by the parties; and

10.2.2 May only provide support and execute functions as set out in these Terms of Reference.

10.2.3 May not develop projects of their own within the beneficiary organisations without the express approval and permission of the parties.



## 11 MONITORING, EVALUATION AND REPORTING

### 11.1 Project monitoring and evaluation

11.1.1 The proposed project monitoring and evaluation (M & E) indicators for the successful delivery of the entire assignment, the means of verification, etc. must be defined by the bidder in the project implementation plan.

11.1.2 The final agreed project M & E indicators, means of verification, etc. will be incorporated in the Project Inception Report to be submitted by the service providers to the MFIP PMU within two (2) weeks after commencement of this assignment.

11.1.3 Overall project level monitoring and evaluation is the responsibility of the MFIP PMU in consultation with the National Treasury's Capacity Building Chief Directorate.

### 11.2 Contractor Reporting Requirements

11.2.1 The reports listed in the table below must be submitted by each deadline of submission. Each report must consist of a narrative section and a financial section. The financial section must contain details of the time inputs of the experts, project-related expenditure and expenditure verification.

11.2.2 Reports shall be written in English; and

11.2.3 All reports, files, notes, and project-related documents shall be structured, formatted, and completed according to the requirements of the MFIP PMU.

Table 6: Contractor reporting requirements

NAME OF REPORT	MINIMUM CONTENTS	SUBMISSION DEADLINE
Project Inception Report	Analysis of existing situation and work plan for the project	Within two weeks after commencement of project.
Monthly Project Progress Reports ( <i>containing both non-financial and financial information</i> )	Progress against approved project deliverables, M & E indicators, any deviations, reasons for deviations and corrective measures taken or to be taken.	Within five working days after the end of each month.
Final Project Close-out Report	Description of overall actual achievements against approved project deliverables and M&E indicators, lessons learned, recommendations, etc.	Within two weeks after the final deliverable has been achieved.

## **12 CONTRACTUAL CONDITIONS**

### **12.1 Contracting authority**

12.1.1 The service providers will contract directly with the GTAC as the contracting authority.

12.1.2 Awarding of the final contract will be subject to the conclusion of a service level agreement between the GTAC and the successful service providers.

### **12.2 Contract fees**

12.2.1 The contract value should be inclusive of VAT and all allowable expenditure.

12.2.2 It is envisaged that the training programme/s will be presented as follows: one (1) contact session per month at a suitable venue in each location as listed in 4.1 above, or as agreed by the parties. The venue will be arranged with the support of the MFIP PMU, in consultation with the service provider, National Treasury stakeholders and the respective Provincial Treasuries. Under exceptional circumstances, the service provider will have to fund the venue requirements.

12.2.3 The contracted service providers must ensure that experts are adequately supported and equipped. In particular, it must ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary training responsibilities.

12.2.4 The contracted service providers are expected to make provision for catering during monthly contact sessions for the enrolled officials, if necessary.

12.2.5 Given the limited budget for this assignment, it is not envisaged that incidental expenditure will be provided for separately.

12.2.6 GTAC will make offers to successful bidders. However, GTAC reserves the right to appoint service providers for the whole or part of this assignment or not to appoint at all.

### **12.3 Intellectual property rights**

GTAC and National Treasury will own copyright of the products of this assignment, except prior material brought into this assignment or that is owned by a third party. The service provider will not use the material (whether in whole or part) without the written permission from the GTAC and National Treasury.

## **13 BID VALIDITY PERIOD**

The bid will be valid for a period of 90 (ninety) days.