



palama

Public Administration Leadership
and Management Academy
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

FOR THE

DESIGN AND DEVELOPMENT

OF THE

PROJECT KHAEDU PROGRAMME

AS PART OF THE

PRESIDENTIAL STRATEGIC LEADERSHIP DEVELOPMENT PORTFOLIO

MANAGED BY THE

EXECUTIVE DEVELOPMENT BRANCH

**TERMS OF REFERENCE:
PROJECT KHAEDU PROGRAMME**

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TERMS OF REFERENCE

PROJECT KHAEDU PROGRAMME – DESIGN AND DEVELOPMENT

1. BACKGROUND

1.1. Introduction

The Public Administration Leadership and Management Academy (Palama) wishes to contract the services of a consortium of reputable higher education institutions and private providers (herein after referred to as service providers) to design and develop a cutting edge action learning programme for executive, senior and middle managers.

Senior managers in the South African public sector carry unique responsibilities, as they determine the future direction of their organisations. Thus they have to demonstrate skills and competencies in terms of the Department for Public Service and Administration (DPSA):

- Senior Management Service (SMS) Competency Framework; and
- Leadership Development Management Strategic Framework, among others.

Palama's purpose is to unlock the efficacy of departments through appropriate training and development interventions to enable them to improve service delivery. The establishment of strategic partnerships between Palama, Higher Education Institutions and private training and development providers further strengthens administrative, management and leadership capacity and builds a robust, competent and committed public service cadre.

The appointed service provider, under the guidance of Palama, will design and develop Project Khaedu Programme materials such that the education, training and development which will be delivered is outcomes-based and aligned to unit standards. The appointed service provider will therefore adhere to the National Qualifications Framework (NQF) and the relevant Education and Training Quality Assurance body's (ETQA) accreditation requirements.

1.2. Institutional Context

The Public Administration Leadership and Management Academy (Palama) is constituted as a Schedule 1 Department by the Public Service Act No. 103 of 1994, as amended by the Public Service Act No. 5 of 1999. It is headed by a Director-General and reports to the Minister of Public Service and Administration.

Palama has been mandated as the training arm of government to professionalise, build capacity and support career advancement in the Public Service. Palama was officially launched in August 2008.

The main challenge for the Academy is to provide training on a large scale to public service officials, in order to enhance government's capacity for effective, efficient and economical service delivery. Palama strives to develop a public service whose members are capable, committed, innovative and user-oriented in service of the South African developmental state. This will be achieved through management development and training that is:

- High quality: accredited and monitored;
- Relevant: to government delivery needs;
- Practical: covering 'hard' and 'soft' generic and specific skills; and
- Aligned: to the Department of Public Service and Administration's competency frameworks for all management levels, and following the Single Public Service, across all spheres of government.

1.3. Project Purpose and Beneficiaries

The purpose of this bid is to secure the services of a suitable service provider to assist Palama in the development of course materials for the Project Khaedu Programme in order to equip managers with the necessary skills and competencies to identify and solve service delivery blockages in their own environments, and to subsequently facilitate optimum leverage for service delivery to citizens.

The current course is presented as a non-credit bearing programme and subsequently has no formal training materials. Palama wishes to change this to an accredited course, and therefore the materials to be developed must consist of course manuals, facilitator, learner, assessor and moderator guides. The expectation is that the service provider would develop the materials for use by the provider appointed for delivery in facilitating the programme.

The target group for the Project Khaedu Programme consists of officials at Middle Management Services (MMS) levels 11 and 12, Senior Management Services (SMS) levels 13 and 14 and Executive Managers at levels 15 and 16 drawn from the nine provinces, national departments and local governments.

Secondary beneficiaries of the Project Khaedu Programme are, amongst others:

- Departments providing deployment sites;
- Public sector in general; and
- The South African public.

2. SCOPE OF THE WORK

2.1. Background

Project Khaedu is an integral part of the government's Batho Pele Revitalization strategy. This project came about as a response to the survey conducted by the Department of Public Service and Administration (DPSA) in 2003 with regard to the extent to which both national and provincial government departments are implementing the Batho Pele Principles. That survey revealed that although some departments are implementing these principles, most departments still regard these as a set of separate principles unrelated to their day to day operations.

As a response to this state of affairs, Cabinet therefore, decided in August 2004 that all Senior Management Services (SMS) members must, during every performance review cycle, be deployed to the coalface of service delivery and that this must be incorporated into their Performance Agreements as one of their Key Performance Areas.

“Khaedu” is a Venda word for “challenge”, and relates to the challenge posed to senior managers to be deployed to service delivery sites annually in order to make a direct contribution to the removal of blockages and improvement of the quality of services delivered. The programme should equip managers with skills related to process design, organisational effectiveness and change management, and support them on their first facilitated deployment.

The objectives of the Project Khaedu Programme are to:

- Equip all SMS and MMS members with a basic management tool kit for problem identification, analysis and resolution,
- Expose SMS and MMS members from all departments to service delivery issues at the coalface, and

- Monitor and evaluate the implementation to ensure that the toolkit is understood and used.

These objectives are advanced through:

1) Core Skills – This is a 5-day facilitated case-based training programme which assists managers in building the core skills required to solve service delivery problems. This module includes the following topics:

- Process Design and Business Maths: Basic introduction to process design concepts such as process mapping, time and value analysis, capacity analysis and best practice development. Three of the SMS competencies as defined by the DPSA are integrated into this module, namely, client orientation and customer focus, service delivery innovation, and problem solving and analysis.
- Organisation Effectiveness: Modern organisation structures, teaming concepts, decision making and authority levels, overcoming human capacity bottlenecks and creating a learning organisation culture. SMS competencies matched to this module are change management and strategic capability and leadership.
- People Management: This is about the core skills in hiring, performance management, discipline and working with organised labour and understanding the change management issues within the public service context. The SMS competencies linked to this module are change management and people management and empowerment.
- Budgets and Controls: This is about developing an effective budget and understanding when a unit/component is unable to effectively control expenditure. This is linked to issues of financial management in line with the SMS competency framework; and
- Communicating for Results: This module revolves on how to present problems and their solutions effectively and is linked to the issue of communication within the SMS competency framework.

In future the newly developed materials should address the generic middle management competencies as defined by the DPSA as well.

2) Deployment (Supervised) – During this 5-day supervised session managers are deployed to service delivery points, where they are supervised and assisted in analysing service delivery problems. They are expected to prepare a short report with recommendations on how a specific situation can be improved.

2.2. Activities

The appointed service provider should engage *inter alia* in the following activities in implementing the contract:

2.3.1 Project Management

The appointed service provider will be responsible for the all activities related to design, development and piloting of new course materials of the Project Khaedu Programme. **A dedicated project manager should be identified to serve as Palama's one-stop contact person. The importance and demands of this role should not be underestimated.**

Output: A dedicated project manager at the service provider with whom Palama can liaise regarding the design and development of new course materials.

2.3.2 Design and development of new materials

The appointed provider will be expected to design and develop new learning materials for this programme. It is envisaged that the programme will be divided into two modules of 5 days each. The first module develops the required core skills while the subsequent 5-day supervised deployment creates the required practical exposure. The programme should be aligned to two unit standards, i.e. Unit Standard 15214 (*Recognise areas in need of change make recommendations and implement change in the team, department or division*) and Unit Standard 252026 (*Apply a systems approach to decision making*).

Guided by Palama education, training and development (ETD) quality management (QMS) policies, procedures and templates, the service provider will be expected to deliver the following outputs:

- Programme frameworks aligned to unit standard requirements.
- Pre-course materials or readings (if required)
- Course manuals
- Portfolio of evidence template
- Facilitators guide
- Learner guides (including Candidate Assessment Guide)
- Assessor guide
- Moderator guide
- Learning outcomes matrix

- Standardised PowerPoint presentations
- Case study bank – containing at least ten educational case studies, covering all three spheres of government, related to each of the following areas:
 - Social;
 - Economic and Infrastructure Services;
 - Governance and Administration;
 - Justice and Protection;
 - International Relations and Special Projects; and
 - Finance and Administration.

Once all the above materials have been received and internally approved, Palama will pursue accreditation and may require further amendments based on the feedback from the relevant ETQA.

Prospective service providers should submit abbreviated curricula vitae of proposed specialists that will be utilised in the design and development of these materials. Only relevant qualifications and experience should be reflected.

Output: New learning materials developed, including a programme framework, pre-course materials, portfolio of evidence template, facilitator guide, learner guide, assessor guide, moderator guide, learning outcome matrix, PowerPoint presentations and a case study bank.

2.3.3 *Training of trainers*

The appointed service provider will be responsible to organise an intervention where training of the trainers can take place. Palama will also participate in the training event. It is envisaged that up to four consortia of providers may be appointed for delivery of the programme in different geographical regions, and therefore there may be a need to have up to four training of trainers' sessions in different cities across South Africa. The appointed provider will be responsible for their own travel and accommodation arrangements and costs in this regard.

2.3.4 *Pilot session*

The appointed service provider will be responsible for the presentation of one pilot session during which the newly developed materials should be tested. This session may take the form of a focus group with key stakeholders represented. Based on the feedback from this session, materials should be refined and amended if necessary.

3. CONTRACT ASSUMPTIONS & RISKS

3.1. Assumptions underlying the Project Khaedu Programme development

The intended success of the project is based on the assumption that certain conditions will exist. These assumptions are:

- Senior managers in the South African Public Sector have the commitment, interest and ability necessary to benefit from this programme;
- Senior managers in the South African Public Sector are committed to fulfil the prescripts in the SMS handbook;
- The necessary buy-in and financial support for human resource development, and this programme in particular, is provided by departments and sponsors to their staff;
- Clients have a need for Project Khaedu commensurate to the needs of the developmental state;
- Communication practices necessary to the learning intervention are in place and supported by the client department;
- Relevant unit standards registered on the NQF are available, and learning materials are aligned to these unit standards;
- The service provider will be enabled to access information from the client's workplace as required for programme development;
- SAQA-accredited structures and processes supportive of quality assurance are in place.

3.2. Specific Risks

The following risks have been identified:

- Resources availability – the availability of expert resources will impact on overall performance and should be managed as a risk area;
- Non-performance – the potential non-delivery or non-performance by the service provider remains a risk to be managed effectively;
- Delays – from the appointed service provider, the client or Palama present a distinct time-based risk. This should be factored into planning, cycles and reporting mechanisms;
- Challenges may be experienced in the accreditation process.

4. EXPECTED OUTPUTS AND OUTCOMES

4.1. Outputs

The expected outputs of the project are as follows:

- Design and development of new learning materials including a programme framework, pre-course materials, course manual, portfolio of evidence template, facilitators guide, learner guide, assessor guide, moderator guide, learning outcome matrix, standardised PowerPoint presentations and a case study bank;
- The appointment of a designated service provider project manager who will manage all facets of the programme and serve as the liaison point between Palama and the service provider;
- Facilitation of pilot session which may take the form of a focus group discussion;

4.2. Outcomes

- A high quality, well designed action learning programme designed specifically for executive, senior and middle managers, which is aligned to government priorities, departmental priorities, SMS Competency Framework, Batho Pele Principles and the government legislative framework.
- Enhanced leadership skills and capacity within the public service.

5. QUALIFICATIONS AND EXPERTISE REQUIRED OF SERVICE PROVIDER

The service provider should demonstrate experience and expertise in the following areas:

- In-depth knowledge of and experience in service delivery and organisational change;
- In-depth knowledge of and experience in curriculum design and development on an executive level;
- In-depth knowledge of the Public Sector;
- In-depth knowledge of working with the National Qualifications Framework (NQF);
- Knowledge and experience in facilitating the action learning methodology;
- Knowledge and experience in facilitating adult learning;
- Hands-on approach in terms of managing the project and the availability of key people to provide the service as and when required;
- Ability to apply cutting edge international trends and practices regarding service delivery;
- Ability to strike a balance between theory and the world of work;
- Be registered as a legal entity and/or have legal status;
- Have the necessary recording and reporting procedures;
- Have an understanding of the Public Finance Management Act;

- In addition, if the service provider is an organisation/institution:
 - Have an organisational structure diagram and description that outlines ETD roles and responsibilities of staff;
 - Have adequate backup, relief or supplementary staffing arrangements;
 - Have a quality management system which outlines the management of:
 - Financial, administrative and physical resources for ETD services;
 - Staff selection, appraisal and development;
 - Off-site practical or work-site components; and
 - Learning programme design, delivery and evaluation.

6. REPORTING

Palama will require bi-weekly detailed written progress reports.

6.1. Final Report

At the end of the contract, the appointed service provider shall provide a final report covering the entire assignment period. The final report will include, *inter alia*, lessons learned and recommendations on the further implementation of the project, as well as suggested measures for further enhancements and improvements, as indicated in Palama's prescribed format.

6.2. Submission and Approval of Reports

All reports and submissions must be supported by invoices and the relevant documentation required by Palama. All reports and documents required for the finalisation of payment should be forwarded to The Project Manager: Project Khaedu Programme, Palama, ZK Matthews Building, 70 Meintjes Street, Trevenna Place, Pretoria. The project manager must approve the documents before payment can be finalised. All reports must be written in English. The final report should be issued in triplicate and must also be made available electronically.

7. BUDGET

Prospective service providers should indicate the budgetary requirements for the design and development of the new learning materials. It is envisaged that the entire assignment should be completed (all documents ready for submission to the Education and Training Quality Assurance Body) within six months after appointment. Budgets presented should not exceed R 500,000.00 (all inclusive).

In addition, if services rendered are deemed unsatisfactory by Palama and are not remedied within 30 days following notification by Palama, the contract may be terminated by Palama immediately.

8. SCHEDULE OF ASSIGNMENT

8.1. Location

Palama's offices are situated in Pretoria. This assignment will, however, be based in some or all nine provinces of South Africa.

8.2. Time Frame

This assignment must be completed within a six month period.

9. INTELLECTUAL PROPERTY

Bidders acknowledge that the intellectual property rights of the Project Khaedu Programme, together with all learning materials and programmes developed by the appointed provider in terms of the Project Khaedu contract, will belong to Palama.

10. REPRESENTATION

It is envisaged that a Training of Trainers session will be arranged by the service provider before any training will commence. All facilitators appointed to deliver this programme should attend this session. The service provider appointed for the design and development of the course materials will not be allowed to market any products or services other than those offered by Palama to the programme target audience.

11. PRESENTATION TO BID EVALUATION PANEL

A pre-selection presentation may be requested by the bid evaluation panel prior to the selection of the preferred providers.

12. RESERVATION

Palama reserves the right not to appoint any bidder or to appoint more than one bidder to undertake any one or more of the required tasks.

SPECIAL CONDITIONS TO BIDS:

PROJECT KHAEDU PROGRAMME – DESIGN AND DEVELOPMENT

Palama shall evaluate each proposal taking into account the following criteria and relative weights:

Directive	Points
1. Organisational experience (relevant experience and track record in teaching and research related to service delivery and organisational change in the public sector)	40
2. Project management capacity	60
3.1 Experience, expertise and profile of the project manager	(10)
2.2 Organisational arrangements to manage the programme	
2.2.1 Design and development of the programme	(30)
2.2.2 Piloting of the programme	(10)
2.2.3 Training of Trainers	(10)
Total	100

1. Any proposal not meeting a minimum percentage score of 60% for functionality will be discarded, and the bid will not be considered for further evaluation.
2. The 90/10 preference points system will apply to this bid.
3. Quotations should be valid for at least 90 days.
4. Late submissions will not be accepted.
5. Bids should be submitted in 2 envelopes – one containing the technical proposal and one containing the financial proposal, and the envelopes should be clearly marked.
6. The risks in the Terms of Reference (ToR) should be accepted.
7. In order for Palama to make a judgment on the qualifications and expertise required as set out in the Terms of Reference, the bidder should provide the curricula vitae (only one page each) of proposed experts that will be utilised for the execution of the contract. Only approved experts will be allowed to be involved in the programme.
8. Examples of existing training materials must be submitted with bid documents.
9. The agreement between Palama and the contractor will be subject to the General Conditions of Contract (GCC).

Special conditions 1-9 accepted.

Signature: Bidder

Print name

Date: