CO-OPERATIVE BANKS DEVELOPMENT AGENCY

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Terms of Reference for Institutions of Higher Learning to Develop a Financial Co-operative Sector Curriculum, Training Materials and Provide Training on the Materials

(CBDA 2011/12)

The Co-operative Banks Development Agency (CBDA) is a public entity created in terms of the Co-operative Banks Act No. 40 of 2007.
The Act can be downloaded from http://www.info.gov.za/view/DownloadFileAction?id=77864

Section 54 of the Co-operative Banks Act, No. 40 of 2007 makes provision for the establishment of the Co-operative Banks Development Agency to support, promote and develop co-operative banks; accredit and regulate representative bodies and support organisations and to supervise and regulate primary co-operative banks.

1. Purpose:

The Co-operative Banks Development Agency (CBDA) would like to engage Institutions of Higher Learning to develop a financial co-operative sector curriculum in line with the National Qualifications Framework (NQF), develop training materials as well as training provision services. The curriculum and training materials developed should be appropriate for adult learners.

2. Background:

The Co-operative Banks Development Agency is tasked with registration and supervision of co-operative banks, building capacity in the sector and promotion of co-operative banking. Research conducted by the CBDA on management practices among Co-operative Financial Institutions (CFIs) has shown that most CFI staff have insufficient knowledge about the legislative framework that govern their CFIs, lack understanding of prudential requirements, human resource management, risk management, accounting and financial management as well as delinquency management and as such are unable to direct and control their CFIs towards institutional and financial sustainability. In view of this, the CBDA is obliged to ensure that the staff in every CFI are at a minimum, able to efficiently manage lending practices; identify, avert and /or mitigate risks; produce compliant monthly financial reports and comply with the minimum prudential requirements, thus directing the CFI to institutional and financial sustainability.

3. Expected Outcomes and Deliverables:

3.1 Institutions of Higher Learning will work closely with the Capacity Building team within the CBDA in developing a curriculum that will empower CFI staff with the necessary knowledge to discharge their duties more effectively;

3.2 The service provider will ensure a thorough understanding of the environment prior to the development of the curriculum and training materials;

3.3 The service provider will develop and/or customize a curriculum and training materials at a level appropriate to the co-operative banking sector and in line with CHE and /or QCTO;

3.4 The service provider will provide training on the curriculum.

3.4 *The objectives of the development of a curriculum for the co-operative financial sector are to:*

- Develop a curriculum and training materials in line with the National Qualifications Framework - the curriculum will include Legislative Framework; Understanding Prudential Regulations; Introduction to Risk Management; Human Resources and Operational Management; Introduction to Accounting for Financial Co-operatives; Micro-Lending Best Practices; Savings and Transaction Accounts; Introduction to Financial Co-operative Sector and Production of Financial Statements;
- Develop and/or customize the curriculum at a level appropriate to the co-operative banking sector;
- Develop a curriculum and training materials that are interactive and appropriate for adult learners;
- Conduct training
- Conduct final review of the curriculum and training materials post pilot training and prepare the final deliverables pack,

NB. Unless otherwise agreed, the copyright of the training materials, as well as of existing material that is substantially modified from the original, will vest in the CBDA.

4. Competency and Expertise Requirements:

4.1 The CBDA will give priority to Institutions of Higher Learning registered on the CBDA's database with expertise in curriculum development and demonstrated experience in developing training materials (sample required), and an understanding of the financial co-operative sector. Organizations that are not yet on the CBDA Database are required to submit their database application information before submitting their bid documents. The application forms can be downloaded at www.treasury.gov.za/coopbank or send an email to CBDA@Treasury.gov.za to request for the forms.

The bid must meet the following minimum requirements:

- The service provider must possess a thorough knowledge of and expertise in the design and delivery of outcomes-based education and training for adult learners (sample required). The CVs of personnel working directly on the development of the curriculum, training materials and the trainers should be attached,
- Submit a document outlining their approach and methodology for developing the materials and fulfilling the objectives of the assignment. The document should not be longer than 4 A4 pages, single spaced;
- Ensure a comprehensive understanding of the financial co-operative environment

prior to the commencement of the curriculum and material development and design;

- Knowledge and understanding of the National Qualifications Framework; and
- Experience of working at community level.

5. Duration and Phasing:

5.1 The consultant/service provider should be available to meet the Director of Capacity Building to review the proposed curriculum, training materials and unit standards available and customisation thereof on 24 October 2011;

5.2 The development of the curriculum and training materials is expected to be done between 24 October 2011 and 31 January, 2012;

5.3 The final report on curriculum and training material development, and related documents are expected to be submitted to the CBDA by 28 February, 2012.

Timing	Activity
18 September 2011	Request for Bids for the development of the curriculum and training materials
30 September 2011	Briefing session
14 October 2011	Applications for the curriculum and training material development, and training provision due
18 October 2011	Selection of consultant / service provider
24 October 2011	Development of the curriculum and unit standards aligned training materials at the level appropriate to the financial co-operative sector
31 January 2012	Review and adoption of the curriculum and training materials
28 February 2012	Submission of reports
1 March 2012	Training roll out

6. Procurement Requirements:

6.1 The duration and price for conducting the entire programme should be stated.

6.2 The hourly fee submitted in the pricing proposal must be an all-inclusive fee for the nominated personnel, including allowances for overhead costs and charges incurred by the service provider as part of normal business operations, including the cost of management, as well as payments to administrative, clerical and secretarial staff used to support processional and technical staff in general and not on a specific project only.

6.3 Prices must be in South African Rand Value and must show the price before VAT, VAT at 14% and the price inclusive of VAT.

6.4 The applicant bids must address and substantiate the requirements in 4.1 above.

6.5 Consultants are expected to state their availability to work on this assignment.

6.6 Consultants are required to fill out and attach all documents in the file titled Standard Bidding Documents (SBD 1, SBD 2, SBD 4, SBD 6.1, SBD 8' SBD 9); and

6.7 Ensure that General Conditions of Contract have been read and understood.

The documents / bids for the Assessments are due by Friday, 14 October 2011, 12 noon.

Bids must be sealed in an envelope clearly stating:
Bid for CBDA 2011/12

DOCUMENTS CAN BE POSTED TO:

NATIONAL TREASURY
TENDER INFORMATION CENTRE
240 VERMEULEN STREET (Corner Andries and Vermeulen Streets)
PRETORIA
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