
The Higher Education Leadership and Management Programme is delivered by Universities South Africa as part of the Department of Higher Education and Training's University Capacity Development Programme.

TERMS OF REFERENCE HELM'S EXECUTIVE LEADERSHIP PROGRAMME

CALL FOR PROPOSALS FOR A FACILITATOR SPECIALISING IN ECONOMICS, FINANCE AND FUNDING OF UNIVERSITIES

1. PURPOSE

The purpose of these terms of reference is to appoint a facilitator specialising in **Economics, Finance and Funding of Universities** to work with and support the Programme Leader for HELM's Executive Leadership Programme (ELP).

2. BACKGROUND

Universities South Africa (USAf), a non-profit company, is mainly funded through membership fees and donor grants. The imperative to enhance leadership and management capacities within the higher education sector remains a priority for the Department of Higher Education and Training (DHET), Universities South Africa (USAf), and the universities themselves. The past years have highlighted emerging management levels from mid to executive positions, both administrative and academic, who are grappling with continuous change and multifaceted complexities. In response, the Higher Education Leadership and Management (HELM) Programme, an initiative of USAf supported by DHET, has developed and implemented bespoke programmes and interventions, ranging from the Student Affairs and Student Success (SASS) Programme, gender equity initiatives such as Women in Leadership (WiL), as well as foundational leadership training and executive development.

3. OVERVIEW OF HELM

The aim of HELM is to provide enabling and empowering learning opportunities to new and current middle and senior managers so that they may acquire knowledge and skills towards the improvement of individual and organisational performance in our universities.

The objectives of HELM are to:

- a) Enhance the leadership capability and capacity of lecturers, emerging, middle and senior managers and executives in the Higher Education (HE) sector.
- b) Expand the pool from which middle and senior academic leaders and managers in the HE sector may be drawn.
- c) Contribute to the stability and effectiveness of institutional leadership and management in the HE sector.
- d) Promote inter-institutional collaborations and partnerships between USAf, HELM and local and international HE institutions.
- e) Promote student success, student support and leadership development, and
- f) Contribute to the realisation of the 'National Development Plan 2030' by advancing a skilled, efficient, and effective leadership in the HE sector that drives economic and social development.

In fulfilling these objectives, HELM seeks to contribute to: (i) individual enablement and work success, (ii) institutional empowerment and improved efficiencies, and (iii) greater sectoral accountability to its key role-players and stakeholders.

To fulfil its objectives, HELM draws on the expertise of leadership and management experts and consultants who have themselves held or are still in senior to executive positions in the universities in South Africa.

For more information on HELM, please visit www.helm.ac.za.

4. OVERVIEW OF THE EXECUTIVE LEADERSHIP PROGRAMME

The main aim and purpose of the Executive Leadership Programme (ELP) is to contribute to the ongoing and sustained development of incumbent university leaders, and to create greater predictability in regard to succession and the development of new leadership cohorts and pipelines. The focus of the ELP is on the ongoing shaping of a transformational, Ubuntu-inspired, high emotional intelligence and complexity leadership perspective. Furthermore, given its emphasis on the development of self-mastery and diplomacy capabilities, the ELP would enable university leaders to better position themselves and their universities for success that is sustainable.

In this regard, considering that leadership is distributed throughout a university, the ELP is a purpose-led executive leaders programme that has the following focus areas: (i) discovering one's leadership purpose; (ii) helping one's colleagues to discover their purposes and (iii) connecting personal and organisational purposes. The ELP has been designed as a tailored and context specific programme, which assists executives in addressing their leadership and management needs. The overall objectives of the ELP are:

- a. To provide an enabling space for university executives to engage with the global and local trends and disrupters currently shaping HE.
- b. To consider the implications of a changing, more volatile, uncertain, complex and ambiguous world for leadership and management in the South African higher education context.

- c. To consider and engage on the day-to-day experiences of university executives and how to create the conditions for effective and inclusive teams, change management, and collective problem solving.
- d. To establish an internal and external support network of university executives who can co-create a learning community, which will have a lasting influence on their institution and the local HE sector.

The ELP is currently being offered at two South African universities working with the Vice Chancellors and members of their senior executive teams. The mode of delivery is in-person and on-site at the universities. A programme framework, programme content and resources have already been developed. The University Economics, Finance and Funding submodule is offered over one full day at each university.

5. SCOPE OF WORK

- 5.1. The specialist University Economics, Finance and Funding facilitator plays a role in both content review/development and delivery, working jointly and collaboratively with the ELP Programme Leader. The Programme Leader takes overall responsibility for the conceptual direction, content, pedagogical approach and quality of the programme.
- 5.2. The Consultant should draw on good practices in leadership and management development programmes' content and delivery modalities globally and locally and to this end is required to:
 - 5.2.1. Conduct a thorough review and, where necessary, update and refine the university economics, finance and funding materials to ensure their continued relevance, accuracy, and alignment with the programme's strategic objectives.
 - 5.2.2. Deliver the content of the learning units in the programme as required and agreed with the Programme Leader.
 - 5.2.3. Develop new, and review and refine existing, appropriate assessment measures and tools for the learning units of the programme, as and when required.
 - 5.2.4. Develop appropriate learning methodologies for the programme.
 - 5.2.5. Design and develop tools and reports on training needs, as and when required.
 - 5.2.6. Perform any other relevant task relating to the HELM activity plan in consultation and agreement with the Director of HELM.

6. DELIVERABLES

The specific deliverables for the assignment include the following:

- 5.1 A report on the review and revision of the relevant learning content for the ELP as specified in the scope of work and agreed with the Programme Leader.
- 5.2 Assessment measures and tools for the relevant learning content of the programme, as and when required.
- 5.3 Appropriate learning methodology plans for the ELP.
- 5.4 A report on the implementation and delivery of the university economics, finance and funding component of the ELP to be submitted within 30 days of the end of the assignment.

7. QUALIFICATIONS AND EXPERIENCE

The Consultant will have experience in the conceptualisation, design and delivery of leadership and management development programmes, with a specialisation in university economics, finance and funding, and have experience in programme delivery from middle to senior executive levels.

The Consultant should meet the following criteria for appointment:

Key qualifications, skills and experience	University economics, finance and funding
Qualifications	The following Minimum Academic Qualifications are essential: • Master's degree in one or more of the following: ○ Business Administration (MBA) ○ Higher Education Management / Leadership ○ Economics or Development Economics ○ Public Administration / Public Policy ○ Finance or Accounting An MBA or Master's in Higher Education Leadership and relevant professional body accreditation will be an added advantage.
Positions held	Must have held a minimum of a senior management position in a relevant university finance and funding portfolio, at Director or CFO levels, at a public university for a minimum of 5 years.
Professional development experience	Must have at least 3 years' experience in professional development programme design and delivery, in university leadership and management development. Demonstrable experience in supporting, or in developing and implementing, learning programmes on functional roles and responsibilities in university finance and funding, from middle management to executive levels.

8. INFORMATION

Additional information, as may be deemed appropriate, must be submitted.

9. ADDING VALUE

It is expected that potential service providers will critique the brief to add value where possible in the proposal to be submitted. Thus, the onus is on the service provider to add value to the brief by leveraging their specialised competencies for the assignment.

10. BUDGET

- 10.1. Universities South Africa has provided for a maximum of **15 work days** for the specialist university academic administration and governance facilitator for this assignment.

- 10.2. Incidental costs such as local travel and accommodation that will be required for the assignment will be arranged and covered separately by Universities South Africa.

11. TIME AND DURATION

- 11.1. The assignment will be completed with the presentation of the deliverables as stipulated in Section 5 above to the Director of HELM by **30 June 2026**.
- 11.2. The assignment will take place over a maximum of 15 work days for the Consultant and be regarded as complete when the Director of HELM approves all planned actions and outcomes.

12. SPECIAL CONDITIONS

No service may be rendered without an official purchase order and a signed contract.

13. CONFIDENTIALITY AND OWNERSHIP OF INTELLECTUAL PROPERTY RIGHTS

- 13.1. The Consultant is required to maintain confidentiality throughout the design and delivery process of this assignment.
- 13.2. The ownership of the intellectual property rights associated with this work will be vested within the Universities South Africa, for its exclusive use.
- 13.3. The Consultant shall request approval of USAf to use materials and information for research or scholarly purposes on information gleaned during this project. Such approval must be obtained in writing from the Contracting Authority.
- 13.4. The Consultant will undertake to ensure that the content developed for the programme would not infringe the intellectual property of any third parties and indemnify USAf of any claims made by the third party against USAf in relation to the content developed for the programme; and
- 13.5. HELM's material is protected by copyright and may not be copied, reproduced, distributed, or used in any form without the prior written permission of USAf.

14. REPORTING

The Consultant will direct any enquiries and report to the Director of HELM at USAf and provide regular feedback on the status of the assignment and any assistance required. A final report will be required at the end of the contract period, outlining the work carried out during the course of the contract, challenges encountered, and potential areas for improvement. The report will also confirm the secure storage of all course content in HELM's repositories.

15. SUBMISSION OF PROPOSALS

- 15.1. A costed proposal with deliverables and timelines which corresponds with the scope of work must be submitted. Proposals must include:
- a. A cover page providing the Consultant's name and all contact information.
 - b. Brief CV highlighting all relevant qualifications, experience and skills.
 - c. Copy of ID and highest qualification.

- d. An assignment plan that details an overview of the approach and tasks to be undertaken to support the delivery of the Executive Leadership Programme for HELM. For the purpose of evaluating the proposal and the Consultant's knowledge and expertise, the proposal should include what the Consultant believes to be key themes and strategic issues relating to university economics, finance and funding which face Vice Chancellors and their executive teams in the execution of their duties and responsibilities in leading a university.
- e. A minimum of two **written** references from clients or from previous employers where the Consultant has undertaken similar work. Universities South Africa reserves the right to verify the authenticity of these references.
- f. A separate quotation (inclusive of VAT, if applicable) for the services to be provided, as per the scope of work and maximum number of days indicated. A quotation template is included as Annexure A. Quotations must remain valid for a period of 90 days.
- g. Valid, original tax pin certificate issued by the South African Revenue Service. (Tax validity will be required throughout the contract).
- h. Additional information, as may be deemed appropriate, must be submitted.
- i. **The closing date for submission of the proposal is Tuesday 28 April 2026, at exactly 16:00.**

15.2. The proposals for the envisaged assignment should be submitted to Ms Molatelo Motswe via the email address molatelo@helm.ac.za.

15.3. If you have not had a response to your application by 29 May 2026, consider your application unsuccessful.

16. CRITERIA FOR SELECTION OF SERVICE PROVIDERS

16.1 Proposals will be evaluated in accordance with the requirements outlined in this Terms of Reference. The evaluation will focus on the service provider's demonstrated technical capability, relevant experience, understanding of the assignment, and capacity to deliver the required services within the specified timeframe.

16.2 Functionality points will be evaluated as follows: The evaluation of proposals will be conducted in two stages. The first stage will assess **functionality**, based on the criteria outlined below. Only bidders that achieve the minimum required score of **70** for functionality will proceed to the second stage of evaluation, which will consider **price and B-BBEE status level of contribution**, in accordance with USAf procurement policies.

16.3 Universities South Africa reserves the right to request additional information, conduct reference checks, or request presentations from shortlisted bidders to clarify aspects of their proposals before the final appointment.

Components to be Evaluated	Evidence	Weighting
Knowledge and experience of the subject matter	Methodology, knowledge of university economics, funding and finance and key strategic issues facing universities' executive management	40
Experience and skills	CV of the Consultant (as per the key qualifications, skills and experience set in Section 7 above)	30
Deliverables	Deliverables as per the proposal. Ability to render the service as required.	20
References	Client base, references: up 3 points for each testimonial as received from a relevant employer or entity for a similar service that has been rendered successfully in the past.	10

17. COST OF SUBMISSION OF PROPOSAL

Universities South Africa (USAf) is not responsible for any costs incurred by the Consultant in the process of developing the proposal.

18. PAYMENTS

- 18.1. Payment shall be made on rendering of professional satisfactory service and submission of the required invoice and timesheet.
- 18.2. Payment shall be made within 30 days into the Consultant's bank account after the receipt of an acceptable invoice and timesheet. (Banking details MUST be submitted for payment to be effected).
- 18.3. Based on the project deliverables, USAf reserves the right to effect payment according to phases completed satisfactorily.
- 18.4. The service provider shall be responsible for his/her own arrangements about income tax or any other tax obligations, such as may be applicable. The appointed service provider hereby indemnifies the Contracting Authority against any liability that the Contracting Authority may incur as a result of any obligation on the Contracting Authority to pay over any tax on behalf of the service provider as a result of the provisions contained in the agreement to be signed with the appointed service provider. For purposes of the Agreement to be signed with the appointed service provider, the term "tax" will include SITE, PAYE and any other form of tax, including interest and penalties. The Contracting Authority will, where applicable, deduct 25% of all fees paid to the service provider and remit them to the South African Revenue Service.

19. CONTRACTING AUTHORITY AND COMPLIANCE

- 19.1. The proposal must either conform to the minimum requirements as set out in this document, or it must be stated clearly how it deviates from these requirements and why. Proposals that strictly adhere to the specifications are preferred. Offers

exceeding the minimum requirements of the specifications are acceptable. Minor deviations may be considered.

19.2. The Contracting Authority for the Consultant is Universities South Africa. Under this assignment, the Consultant will be accountable to the Director of HELM.

19.3. This document will form part of the signed contract between the successful Consultant and USAf once the proposal has been accepted by USAf.

19.4. Non-Compliance with Delivery Terms

19.4.1. As soon as it becomes known to USAf that the service provider will not be able to render services within the expected period and/or against the quoted price and/or as specified, USAf must be given immediate written notice to this effect. In instances of non-compliance with certain sections of the contract by the service provider, USAf reserves the right to terminate the agreement.

19.5. Pricing

19.5.1. All prices must be in South African Rand value and must be inclusive of VAT. Fees will be payable in South African Rands on satisfactory completion of the assignment.

19.6. Client Base

19.6.1. Service providers must have specific experience in the delivery of the required service. They must submit at least recent references or a client base reflecting the entity where a similar service was rendered, the duration, the project value, the date, and whether the project was successful. USAf reserves the right to contact references during the evaluation and adjudication process to obtain confirmation.

19.7. Company Profile, Financial Information and BEE Shareholding

19.7.1. The company's profile, together with the BEE certification, is mandatory.

19.8. Registrations

19.8.1. Proof of company registration must be submitted in the form of copies of the relevant registration documents. e.g. CC/CK, Pty (Ltd). It is the service provider's responsibility to ensure that their Cipro annual returns are in order and that the registration remains valid throughout the contract tenure.

19.9. Tax Pin Certificate

19.9.1. An original and valid tax pin certificate issued by the South African. Revenue Service certifying that the taxes of the service provider are in order must be submitted before the closing date and time. It is the service provider's responsibility to ensure that their SARS annual returns are in order and that the registration remains valid throughout the contract. Failure to do so will invalidate the proposal.

19.10. Enquiries may be directed only in writing to:

Ms Molatelo Motswe
Administrator: HELM
Universities South Africa
Pretoria
E-mail: molatelo@helm.ac.za

ANNEXURE A: QUOTATION TEMPLATE

QUOTATION

Name Address Phone: Email:	QUOTE NO: DATE:
To: Universities South Africa (USAf) 1267 Pretorius Street, Hadebfields Office Park, Hatfield 0081 VAT: 4200226415 ATTENTION:	For: Provision of services as a specialist university economics, finance and funding facilitator for HELM's Executive Leadership Programme

DESCRIPTION	Units	AMOUNT	
TOTAL			

Banking details

Tax Number

Signature