
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

CALL FOR QUOTATIONS FOR A FACILITATOR SPECIALISING IN HUMAN RESOURCES/PEOPLE DEVELOPMENT IN HIGHER EDUCATION

1. PURPOSE

The purpose of these terms of reference is to appoint a facilitator specialising in Human Resources/People Development in higher education to work with and support the Programme Leader for HELM's Foundations of Leadership (FoL) Programme.

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 which are the focus of this call.

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 FOUNDATIONS OF LEADERSHIP PROGRAMME

The Foundations of Leadership Programme (FoL) is offered in two versions:

- a. FoL Academic: Deans, Deputy Deans, heads of schools, and heads of academic departments/divisions.
- b. FoL University Managers: directors, deputies, and heads of administrative, professional and support departments/divisions.

The objectives of the Foundations of Leadership Programme are to:

- Develop an informed perspective on leadership and strategic planning in Universities;
- Promote creative problem-solving through a participative pedagogy, self-reflection and group interaction;
- Acquire new perspectives and skills which would contribute towards effective operations at participants' universities;
- Formally and informally engage with other participants, exchange ideas, and share experiences which support personal and institutional development.

The FoL Programme is delivered online and consists of two modules of 2.5 days each (i.e. a total of 5 days), structured through expert inputs, personal and group exercises, and customised case studies. FoL has been delivered in its current online format since 2021 and minor revisions have been made since then to update content as required based on relevant contextual policy and legislative changes and developing trends, as well as programme participants' feedback.

Four workshops of Part 2 of this programme will be held between 1 February and 31 March 2027. The People Development component of FoL Part 2 is a morning-long

session (approximately 5 hours) on Day 3. It should be noted that the four workshops are repeated workshops with the same content delivered to different groups of participants.

HELM uses Canvas as its Learning Management System for the FoL programme and provides Canvas and related technical support to the programme implementation team. FoL has been delivered in its current online format since 2021, and a programme framework, programme content and resources have already been developed.

5. SCOPE OF WORK

- 5.1. The specialist human resources/people development facilitator works jointly and collaboratively with the Programme Leader for FoL. The Programme Leader takes overall responsibility for the conceptual direction, content, pedagogical approach and quality of the entire FoL programme.
- 5.2. The Human Resources/People Development 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. Review and, where necessary, update and refine the Human Resources/People Development materials and resources to ensure their continued relevance, accuracy, and alignment with both higher education policy and the programme's strategic objectives.
 - 5.2.2. Ensure that the Human Resources/People Development learning unit and its related materials and resources are uploaded onto the Learning Management System (LMS), with the support of the HELM LMS specialist.
 - 5.2.3. Deliver the content of the Human Resources/People Development learning unit in the programme as required and agreed with the Programme Leader.
 - 5.2.4. Review and refine existing activities, assessment measures and tools for the Human Resources/People Development unit of the programme, as and when required.
- 5.3. Design and develop tools and reports on training needs, as and when required.
- 5.4. Attend team meetings and preparatory dry runs for every scheduled workshop.
- 5.5. 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:

- 6.1 A report on the review and revision of the relevant learning content on the Human Resources/People Development unit for the FoL and Programme as specified in section 5 and agreed with the programme leader.
- 6.2 Activities, assessment measures and tools for the Human Resources/People Development unit of the FoL programme, as and when required.
- 6.3 A report on the implementation and delivery of the human resources/people development component to be submitted within 14 days of the end of the programme.

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 human resources/people development, and have experience in programme delivery from middle to senior executive levels in public universities.

The Consultant must meet the following criteria for appointment:

Key qualifications, skills and experience	HR specialist facilitator
Qualifications	Minimum of a Master's degree in a relevant field
Positions held	Must have held a minimum of a senior management position in a relevant human resources portfolio at a 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 universities, from middle management to executive levels
Publications	Research and publication track record in the field of leadership and management development, with at least two (2) peer-reviewed journal articles being an added advantage
Course delivery/LMS experience	At least two years (2) experience in both in-person and online learning and course delivery using a Learning Management System (knowledge of Canvas is an added advantage)

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. This assignment will be funded by HELM and the service provider will be remunerated in accordance with USAf procurement policies, taking into consideration the range and scope of the work, as well as their level of experience and expertise.

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 6 above to the Director of HELM by **31 March 2027**.
- 11.2. The assignment will be regarded as completed when the Director of HELM is satisfied that all planned actions in response to the scope of work and deliverables have been addressed.

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 sign an agreement with USAf to the effect that:
 - 13.4.1. They 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
 - 13.4.2. 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. Should a consultancy or company submit a proposal, then the consultancy or company details (including registration details) should be included, as well as copies of relevant company registration documents and B-BBEE certificate.
 - b. Brief CV highlighting all relevant qualifications, experience and skills.
 - c. Copy of ID and highest qualification.

- d. A proposal and assignment plan that details an overview of the approach and tasks to be undertaken to support the delivery of the FoL Programme for HELM as outlined in section 5 above. For the purpose of evaluating the proposal and the Consultant's contextual and subject matter knowledge and expertise, the proposal should include what the Consultant believes to be key themes and strategic issues relating to university Human Resources/People Development which face middle and senior managers in the execution of their duties and responsibilities in their universities. In this regard, an indicative outline of the Human Resources/People Development component could also be provided.
- e. At least three written references or testimonials 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 (i.e., based on the delivery of four repeated workshops delivered to different groups of participants as described in Section 4). 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 Monday 26 October 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 Friday 18 December 2026, consider your application unsuccessful.

16. CRITERIA FOR SELECTION OF SERVICE PROVIDERS

16.1. The proposal will be evaluated in terms of the requirements of the request for quotations and any information which may be deemed necessary.

16.2. Functionality points will be evaluated as follows:

Components to be Evaluated	Evidence	Weighting
Knowledge and experience of the subject matter	Methodology, knowledge of the subject matter	30
Experience and skills	CV of the Consultant (as per the key qualifications, skills and experience set in Section 5 above)	30
Deliverables	Deliverables as per the proposal. Ability to render the service as required.	20
References	Client base, written references or testimonials from relevant employers or entities for a similar service that has been rendered successfully in the past.	20

16.3 Bidders must score a minimum of 70 points to qualify for further evaluation on B-BBEE and price or to be considered as a preferred bidder.

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
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 HR facilitator for HELM's Foundations of Leadership Programme

DESCRIPTION	Units	AMOUNT	
TOTAL			

Banking details

Tax Number

Signature