
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 FOUNDATIONS OF LEADERSHIP (FoL) PROGRAMME

CALL FOR PROPOSALS FOR A PROGRAMME LEADER

1. PURPOSE

The purpose of these terms of reference is to appoint a consultant to serve as a Programme Leader for the 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 the 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 which is 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 with similar content to the following two target groups:

- 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 structure and delivery arrangements of the Foundations of Leadership Programme are as follows:

- The 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.
- It is anticipated that up to six (6) Part 1 workshops and up to four (4) Part 2 workshops will be held up to March 2027.
- HELM endeavours to register 30 participants per workshop.

- HELM uses Canvas as its Learning Management System for the FoL programme and Zoom as its meeting platform. HELM provides Canvas and Zoom 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.

All sessions and dates will be negotiated with the implementation team.

5. SCOPE OF WORK

The FoL Programme Leader will be expected to:

- 5.1. Work jointly and collaboratively with a Co-Facilitator to deliver the FoL programme, while taking overall responsibility for the conceptual direction, content, pedagogical approach and quality of the FoL Programme, with the Co-Facilitator providing a supportive role in relation to content and delivery.
- 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 materials to ensure their continued relevance, accuracy, and alignment with the programme's strategic objectives.
 - 5.2.2. Ensure that the course and its related materials are uploaded onto the Learning Management System (LMS) and regularly updated, with support from the HELM LMS specialist.
 - 5.2.3. Deliver the content of the learning units in the programme as required and agreed with the Director of HELM and supported by the Senior Manager: HELM.
 - 5.2.4. Develop new, and review and refine existing, appropriate assessment measures and tools for the learning units of the programme, as and when required.
 - 5.2.5. Develop an appropriate online learning methodology for the programme.
- 5.3. Develop new, and review and refine existing, appropriate and effective monitoring and evaluation measurement tools for the programme in consultation with the Director of HELM and supported by the Senior Manager: HELM.
- 5.4. Design and develop tools and reports on training needs, as and when required.
- 5.5. Perform any other relevant task relating to the HELM activity plan in respect of the FoL programme in consultation and agreement with the Director of HELM.

The allocation of specific responsibilities and activities between the Programme Leader and Co-facilitator will be finalised at the inception phase, once both Consultants have been appointed.

6. DELIVERABLES

The specific deliverables for the assignment include the following:

- 6.1. **Programme content review and development:** Provide programme leadership in the review and revision of the FoL learning content, in consultation with the Co-facilitator.

- 6.2. **Online learning methodology plan:** design of the online learning plan with relevant case studies and activities, for the FoL programme.
- 6.3. **Monitoring and evaluation framework:** Develop and oversee the implementation of monitoring and evaluation tools for the programme in collaboration with the Co-facilitator and in consultation with the Director of HELM.
- 6.4. **Programme implementation oversight:** Provide overall academic and programme leadership for the implementation and delivery of the FoL Programme during the 2026/27 cycle, working collaboratively with the Co-facilitator and the relevant technical support consultants for the LMS and online meeting platform.
- 6.5. **Programme implementation report:** Submit a report on the implementation and delivery of the FoL Programme for the 2026/27 cycle within 30 days of the completion of the programme.

7. QUALIFICATIONS AND EXPERIENCE

The Consultant will have experience in the conceptualisation, design and delivery of leadership and management development programmes.

The Consultant should meet the following criteria for appointment:

Key qualifications, skills and experience	Programme Leader
Qualifications	Minimum of a Master's degree, but a PhD will be an added advantage
Positions held	Must have held the position of at least DVC or Dean at a public university for a minimum of 5 years
Professional development experience	Must have at least 5 years' experience in professional development programme design and delivery, in university leadership and management development Demonstrable experience of developing and implementing learning programmes on functional roles and responsibilities, in universities
Publications	Well-established academic track record of publications in the field of leadership and management development, with at least 3-5 peer-reviewed journal articles
Course Instruction and Delivery	At least three years (3) of experience in blended learning and course delivery using a Learning Management System (knowledge of Canvas is an added advantage)

8. BUDGET

- 8.1. Universities South Africa has provided for a maximum of **50 work days** for the Programme Leader for this assignment.
- 8.2. 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.

9. TIME AND DURATION

- 9.1. The assignment will be completed with the presentation of the deliverables as stipulated in 4 above to the Director of HELM by **31 March 2027**.

- 9.2. The assignment will take place over a maximum of 50 work days for the Consultant and be regarded as complete when the Director of HELM approves all planned actions and outcomes.

10. SPECIAL CONDITIONS

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

11. CONFIDENTIALITY AND OWNERSHIP OF INTELLECTUAL PROPERTY RIGHTS

- 11.1. The Consultant is required to maintain confidentiality throughout the design and delivery process of this assignment.
- 11.2. The ownership of the intellectual property rights associated with this work will be vested within the Universities South Africa, for its exclusive use.
- 11.3. 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.
- 11.4. The Consultant will sign an agreement with USAf to the effect that:
- 11.4.1. 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
 - 11.4.2. 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.

12. 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.

13. SUBMISSION OF PROPOSALS

- 13.1. 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. An 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 above. For the purpose of evaluating the proposal and the Consultant's knowledge and expertise, the proposal should include a high-level curriculum that outlines what

the Consultant believes would be key topics/themes and methodology to support the professional development of the middle- to senior managers identified in Section 4 above.

- e. A minimum of two 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. **The closing date for submission of the proposal is Wednesday 6 May 2026, at exactly 16:00.**

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

13.3. If you have not had a response to your application by 8 June 2026, consider your application unsuccessful.

14. CRITERIA FOR SELECTION OF SERVICE PROVIDERS

14.1 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.

14.2 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.

14.3 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 leadership and management topics and issues relevant to the specified target groups in universities	40
Experience and skills	CV of the Consultant (as per the key qualifications, skills and experience set out 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

15. 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.

16. PAYMENTS

- 16.1. Payment shall be made on rendering of professional satisfactory service and submission of the required invoice and timesheet.
- 16.2. 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).
- 16.3. Based on the project deliverables, USAf reserves the right to effect payment according to phases completed satisfactorily.
- 16.4. 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.

17. CONTRACTING AUTHORITY AND COMPLIANCE

- 17.1. 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.
- 17.2. The Contracting Authority for the Consultant is Universities South Africa. Under this assignment, the Consultant will be accountable to the Director of HELM.
- 17.3. This document will form part of the signed contract between the successful Consultant and USAf once the proposal has been accepted by USAf.

17.4. Non-Compliance with Delivery Terms

17.4.1. 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.

17.5. Pricing

17.5.1. 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.

17.6. Client Base

17.6.1. 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.

17.7. Company Profile, Financial Information and BEE Shareholding

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

17.8. Registrations

17.8.1. 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.

17.9. Tax Pin Certificate

17.9.1. 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.

17.10. Enquiries may be directed only in writing to:

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

Reviewed and approved by:

Name: Prof Peter Mbat
Position: Director: HELM

Signature:

Date: April 2026

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 Programme Leader for HELM's Foundations of Leadership Programme

DESCRIPTION	Units	AMOUNT	
TOTAL			

Banking details

Tax Number

Signature