

TERMS OF REFERENCE

Technical Assistance to conduct Capacity Building Workshops for Community Education and Training (CET) College Management, Governing Councils, and Student Representative Councils (SRCs) of the CET Colleges

FRAMEWORK CONTRACT BENEFICIARIES 2013 – LOT 9 – CULTURE, EDUCATION, EMPLOYMENT AND SOCIAL

Request for Service 2017/393718 V1

1. BACKGROUND

1.1 Purpose

Technical Assistance services are required to prepare training material and conduct Capacity Building Workshops for Community Education and Training (CET) College Management, Governing Councils, and Student Representative Councils (SRCs). This entails contributing to the capacity building for community colleges

1.2 Beneficiary Country

The Republic of South Africa.

1.3 Contracting Authority

The Contracting Authority is the European Union Delegation (EUD) to South Africa.

1.4. General information

Within the framework of the South Africa Multiannual Indicative Programme (MIP) 2014-2020, the Teaching and Learning Development Sector Reform Contract (TLDSRC) seeks to 'assist the Government in transforming the education, training and innovation system so that it can contribute to improved economic performance of the country.' The Programme's second specific objective (SO2) is to improve access to, and the quality of, Technical and Vocational Education and Training (TVET) and Community Education and Training (CET) colleges.

One of three financing modalities of the TLDSRC, the Teaching and Learning Development Sector Support Programme (TLDSSP), includes several sub-programmes. Sub-Programme 2, the Capacity Building of TVET College Lecturers through open learning programme (OLP), is

the context within which this assignment has been initiated, and can make a substantial contribution.

1.5 Information on CET Colleges

In 2009 the President, by proclamation established the Department of Higher Education and Training (DHET) and the Department of Basic Education. The Department of Education (DoE) was abolished following this reorganisation.

Following this re-organization of government, on 1 July 2009 the administration of the Adult Basic Education and Training Act (Act No. 51 of 2000) and the General and Further Education and Training Act (Act No. 58 of 2001) were assigned to the Minister of Higher Education and Training (Department).

In April 2011 the Minister appointed the Task Team on Community Education and Training Centres to investigate and recommend a distinct, unique and more effective alternative institutional form to address the education and training needs of adults and out-of-school youth. The motivation was to conceptualise a workable institutional model for community education and training centres that considers the following factors: the ethos and mission of the institution, the diversity of programme offerings, strong articulation with existing institutions, service to the community, business and industry; and life-long learning opportunities.

The task team then proposed Community Learning Centres and Community Colleges as the institutional type to address the needs of adults and out-of-school youth for literacy, basic and secondary education, vocational and occupational programmes. It recommended that Community Learning Centres be nationally coordinated and linked to a nearby Community College. The ideal was that the model of Community Learning Centres and Community Colleges should build on the experience of the Public Adult Learning Centres.

With effect from 1 April 2015, the Community Education and Training (CET) function became the exclusive responsibility of the Department. The Minister subsequently published the establishment of nine community education and training colleges in a Government Gazette dated 7 November 2014.

As a result the 3 276 Community Learning Centres – formerly known as Public Adult Centres (PALCs) – were merged under the nine Community Colleges established. The Community Colleges operate under the guidance of College Councils constituted by the Minister. The Minister appointed and officially welcomed 45 College Council members on 05 September 2015.

Councils are tasked with providing good governance and oversight to ensure that the activities of college management culminate in the attainment of our strategic goals and objectives contained in the White Paper for Post-School Education and Training. The inauguration of College Councils was not only a historical event, but a sign of commitment of the Department to transform this historically neglected sector. This commitment was supported by the appointment of a cadre of council members with requisite expertise, experience and insight.

The key thrusts that drive PSET are promoting access, expansion, transformation and diversified provision. The approved National Policy on Community Colleges identifies key areas for operational framework for these institutions. The relevant monitoring and evaluation (M & E) framework ensures tracking of student enrolments and permits assessment of the impact of these institutions in promoting social cohesion and access to employment or self-employment, including further learning opportunities. The envisaged Central Application Service will ensure that numbers enrolled in the sector are verified, which will significantly improve our planning system. These are reforms that require management and council members to acquire skills relevant to the sector and its demands.

The key goal is to expand the expansion of educational opportunities, including offering the necessary support for people with disabilities, and diversification of programmes.

In light of the preceding background information, **section 2** of these terms of reference provides an outline the services required from qualified experts under different categories I and II

2. Description and scope of services

2.1 Global objective

The overall objective which this contract will help to achieve, is to contribute to the alleviation of barriers to education and training, and of unemployment, poverty and inequality in South Africa through enhanced capacity development in promoting educational and economic development, and raising standards of living in line with the priorities of the South African Government.

2.2 Specific objective:

The specific objective of the assignment is to develop training materials and use them to facilitate **five 3-day** Training workshop sessions targeting groups comprising of CET College Management (Principals and Deputy Principals), Governing Councils and Student Representative Council (SRC) Members. The participants will be provided with methods,

tools and approaches in management and governance of Community Colleges. The groups to be trained as shown in **Table 1**.

Table 1: Training groups, venues and timelines¹

Target Group	Location	Duration	Date
(Group 1) 54 SRC members plus 5 DHET officials	Port Elizabeth	3 days	10-12 April 2018 (Friday Saturday and Sunday)
(Group 2) 54 SRC members plus 5 DHET officials	Port Elizabeth	3 days	13-15 April 2018 (Friday Saturday and Sunday)
(Group 1) CET College Governing Councils: 72 members plus 5 DHET officials	Durban, Kwa Zulu Natal	3 days	17-19 April 2018
(Group 2) CET College Governing Councils: 72 members plus 5 DHET officials	Durban, KwaZulu-Natal	3 days	24-26 April 2018
CET College Management: Principals: 9 Deputy Principals Finance: 9 Deputy Principals Academic: 9 Deputy Principals Corporate: 9 Total: 36 plus 5 DHET officials	Magaliesburg, Gauteng	3 days	2-4 May 2018

2.3 Duties and responsibilities- Lead Expert (KE1):

In order to achieve objectives the Expert(s) will:

- Review relevant legislations and policy documents impacting on the management and governance of community colleges. Documents to be reviewed shall include the **Continuing Education and Training (CET) Act (Act No. 16 of 2006, as amended)**, the King Report, and other skills development legislation.
- Develop training materials, including power point presentation slides, for use in the facilitation of training. These tasks shall include developing a concept

¹ The timelines shall be reviewed during the inception meeting

note of the Community Education and Training (CET) sector and training description, workshop agenda, working methods and procedures, hand-outs and workshop evaluation questionnaire forms which will be discussed with the Acting Deputy Director General (DDG): Community Education and Training (CET). The Acting DDG: CET will approve all training materials five days from the submission by the expert. The Expert shall revise the materials in accordance with Acting DDG's comments before presentation.

- Provide advice to the Acting DDG: CET, Director: Governance and Management Support and Director: Development Support at the Department, on background materials to be distributed to workshop participants.
- Hold face to face meetings with the Acting DDG: CET, Director: Governance and Management Support and Director: Development Support, to agree on the training dates, class size and additional support required during the workshop facilitation, and draft the final Training programme.
- Prepare, as part of the inception report, a list of equipment and other training aids necessary in the effective delivery of training.
- Draft a workshop report showing lessons learnt and other recommendations for the Department to consider in the implementation of future reform.

2.4 Duties and responsibilities – Key Expert 2

- Facilitate training on the subject matter aspects of the workshop as agreed with the lead expert
- Hold face to face meetings with the Acting DDG: CET, Director: Governance and Management Support and Director: Development Support, to agree on additional support required by the lead expert during the workshop facilitation.
- Contribute to the drafting of a consolidated workshop report showing lessons learnt and other recommendations for the Department to consider in the implementation of future reform.
- Moderate the deliberations during the training sessions
- Revise the training materials in light of the emerging realities and administer workshop evaluation instruments

2.5 Key deliverables and timelines

Deliverables deadline:

- I. Prepare and submit a project inception note at the end of five days after project commencement.
- II. Training programme, material development, concept note, etc. shall be submitted to the Acting DDG: CET within 15 working days of the inception of

the project. The Department team shall review and validate the material within five days of receipt.

- III. Conduct five training sessions with target audience, as nominated by the Department. The first workshop to be held indicatively as from 9 April 2018. Training successfully delivered by no later than 15 May 2018.
- IV. Consolidated final report for all workshops, including CD of training materials. The report should be submitted no later than 31 May 2018.

Table 2: Working days per expert

Indicative dates	Task	Key expert 1	Key Expert 2
12-16 February to 2018	Review of background materials and preparation of concept note, training programme, including one day of meeting attendance.	5	0
19 February – 9 March 2018	Development of training materials, including slides and learning outcomes (end of mission 1)	15	0
12 –20 March 2018	Department staff review and validate developed workshop materials	0	0
02-06 April 2018	Revisions to draft materials and workshops preparations, including 1 day of meeting attendance	5	1
9 April - 11 May 2018	Work shop facilitations (5 workshops of 3 days each). 2 days are provided for workshop reports after each work shop and preparatory work for the next work shop.	24	24
14-18 May 2018	Final reporting	5	5
TOTAL		54	30

After the delivery of the Training, the Expert shall submit a final report to the Acting DDG: CET and Director: Development Support. The report shall provide conclusions and recommendations based on lessons learnt, results of training evaluation and an assessment of suitability of training venues.

2.6 Experts' profile

Number of requested experts per category and number of man-days per expert or per category

Expert category	Total working days	Number of experts
Key Expert 1	54	1
Key Expert 2	30	1

Profile of key Expert 1 (Team leader)

Qualifications and skills: At least Master's Degree in Education, Public Administration, Development studies, Social Sciences or, in its absence, equivalent professional experience include; at least 12 years in: Community Education and Training/ Adult Education and Training comprehensive sector policy design and development; education sector analysis and reform; and education sector plan financing and implementation (MTEF, management of the education system, planning and programming, EMIS, governance, quality assurance, strategic planning).

General professional experience: At least 12 years of work experience in the sector(s) related to education and socio-economic, 6 of which should be in executive management training and Adult Education and Training or post school education training institution governance experience.

Specific professional experience: Evidence of training material development and proven working experience in conducting executive management training, especially in higher education, solid knowledge of the CET (Act No. 16 of 2006) would be a strong advantage' knowledge of and experience in South African public sector.

Soft skills: Ability to work co-operatively and effectively in a multi-cultural environment.

Language skills: Excellent spoken and written command of English.

Profile of Key Expert 2

Qualifications and skills: At least Master's Degree in Education, development studies, Social Sciences or, in its absence, equivalent professional experience of 8 years. Equivalent professional experience include; at least 6 years in: Community Education and Training, executive training moderation or facilitation, higher education; policy design and

development; education sector analysis and reform; and education sector plan financing and implementation (MTEF, management of the education system, planning and programming, EMIS, governance, quality assurance).

General professional experience: At least 6 years of work experience in the sector(s) related to education and socio-economic with emphasis on executive management training

Specific professional experience: Proven working experience in conducting executive management training, especially in higher education, solid knowledge of the CET (Act No. 16 of 2006) would be a strong advantage' knowledge of and experience in South African public sector.

Soft skills: Ability to work co-operatively, facilitation skills, and effectively in a multi-cultural environment.

Language skills: Excellent spoken and written command of English.

2.7 Training programme and training content

2.7.1 Management (Principals and Deputy Principals) and Councils:

- ✓ Governance and legislative environment
- ✓ Organisational Management and Leadership (including principles of Human Resource Management, Marketing)
- ✓ Financial Management – Basic bookkeeping, asset management, revenue management, budgeting, and financial management (Operations Management)
- ✓ Conflict Management
- ✓ Strategic planning and direction
- ✓ Information for Monitoring and Evaluation
- ✓ Stakeholder relations and management
- ✓ Principles of Ethics Management

2.7.2 Student Representative Council

- ✓ Governance
- ✓ Legislative environment
- ✓ Organisational Management and Leadership
- ✓ Basics of Financial Management – Basic bookkeeping and financial management
- ✓ Conflict and change Management
- ✓ Principles of project management
- ✓ Principles of Ethics Management

The areas suggested above shall be discussed with the Expert during the inception phase. Documents to be reviewed shall include skills development legislation and White papers impacting of higher education.

2.8 Methodology and logistical support

Participants and size:

Training participants shall be divided into five groups as shown in **Table 1**

Selection of participants:

Participants nominated for Training shall be predetermined, selected on the basis of their participation in Management, Governance and Student Representative Councils. The Acting DDG: CET shall coordinate the nominations and dispatch letters of invitations to delegates.

Logistics and equipment:

The Acting DDG: CET shall confirm the requirements with the Expert. All necessary equipment: computer, projector, flipchart, office supplies and other materials, at the request of the Expert, shall be supplied to ensure effective completion of the training programme. These items shall be supplied in terms of a separate contract as provided for in the Lot 5.

Language of instruction:

English language shall be the language of instruction.

Training materials and input:

The Acting DDG: CET and the Director: Governance and Management Support at the Department will ensure printing of all training materials. The Branch Coordinator and Director: Development Support at the Department will provide the Expert with the necessary available information and materials for the fulfilment of tasks and will facilitate the necessary meetings. This shall be requested during the preparation of the training concept note.

2.8.6 Organizational Setting:

The two Experts:

- Will work under direct supervision of the Acting DDG: CET shall consult with the Acting DDG: CET, Director: Development Support and Branch Coordinator. Expert One (TL) takes lead and guide Expert Two on the nature of support needed during the facilitation of workshops and reporting.
- Will work from their home base and the Training venues except where they are required to attend meetings at the Department.
- Shall participate at working sessions specifically convened to achieve the outputs of this assignment.
- Travel and accommodation shall be facilitated in terms of the contract concluded with the contracting authority.

3. Location of Assignment, office accommodation, equipment

3.1 Starting period

The assignment shall commence indicatively on 12 February 2018 – approximately end May 2018.

3.2 Location

The Experts will work from the Department's offices (123 Francis Baard Street, Pretoria). Adequately equipped office accommodation of a reasonable standard, with a telephone line, will be made available at the Department to enable the Experts to prepare plans, programmes, materials, reports, etc. during missions. Internet access will be to the account of the Experts. Facilitation of workshops shall be undertaken in Durban (in KwaZulu-Natal Province), Port Elizabeth (Eastern Cape Province), and Magalies (North West Province).

The Experts are responsible for his/her own travel and accommodation costs during the missions, as well as any other related operational costs and insurance.

3.3 Support from the Department

The Department will provide the following support for the Experts:

- Supply the Experts with all relevant contextual information required;
- Access to project and specialist staff;
- Organise and cover the costs of workshops to be held with officials;
- Duplicating facilities for materials to be distributed; and
- Reasonable assistance required by the Experts to execute his/her duties.

The Experts will liaise with the Director: Governance and Management Support for all outputs and programmatic aspects of the assignment. The Expert will liaise with the EU

Delegation for all contractual matters and issues related to the implementation of his or her tasks.

4. Reporting

4.1 Content

The Experts will submit:

- A detailed assignment plan, including an inception report;
- A workshop report following each workshop;
- Training materials prepared during the assignment;

Progress reports are to be submitted, as for all EU-supported projects, according to the schedule agreed between the EU and Department, to be finalised following comments received from the EU and Department stakeholders.

4.2 Correspondence

All correspondence, including reports, must be written in English.

4.3 Timing of submissions and project finalisation

The contracting authority and the Department shall, within 30 days of receipt, notify the Framework contractor of their decision concerning the final report. If the contracting authority does not give any comments on the final report within such time limit, the Framework contractor may request written acceptance of it. The final report shall be deemed to have been approved by the contracting authority and Department if they do not expressly inform the framework contractor of any comments within 15 days of receipt of this written request.

4.4 Format

The reports should be in MS Word.

Five (5) copies of the final close-out report (including an electronic format) should be formally submitted to the Directorate: Development Support.

4.5 Copyright of reports, learning resources and training materials

All copyright and all intellectual property rights in respect of reports, learning resources and training materials developed by the Expert during this project will vest in the Department of Higher Education and Training, which will have the right subject to releasing them as open educational resources under an appropriate copyright licence, to allow any individual, official, company, agency or organisation to use or modify the materials for any purpose approved by the Department.

5. Budget and Incidental Expenditure

A provision for up to 3 return international and 4 return domestic flight tickets are foreseen as reimbursable expenses of the contract.

This is a fee-based contract. **The maximum budget is €95,000**

The proposed budget should make provision for:

- International and/or local travel, depending on the home base of the Experts proposed.
- *Per diems* depending on the home base of the Experts proposed, with a rate of EUR 166 per day for each day of work, including travel days.

Offers should include a proposal not exceeding 10 pages which details the approach, methodology and action plan that the Expert will follow during this assignment

The Director: Governance and Management Support will sign timesheets for the expert remuneration.

6. Administrative information.

Contracting authority

The Contracting Authority is the EU Delegation in Pretoria. The Expert will formally report to the EU Delegation. For this reason, the EU delegation should be included in all correspondence related to this contract. The EU as the Contracting Authority has set arrangements for payment to Framework Contractors/experts which is handled by the EU Delegation.

The EU Delegation Task Manager's details are:

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Pretoria 0027
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The beneficiary national Department

The beneficiary is Department of Higher Education and Training (Department). The Director: CET Governance and Management Support at the Department will have a day-to-day oversight role and will be the primary contact point for engagement with the contractor.

Contracting authority and interview

The Contracting Authority reserves the right to conduct interviews with the potential candidates.

Monitoring progress

Monitoring of progress towards achieving expected results in this assignment will largely be on the basis of outputs specified in 2 and 3 above.

Key documents

The documents referenced in under paragraph 1 shall be availed to the Expert during the assignment execution. The shall be in addition the Codes of Governance applicable to government, public financial management legislations, planning and budgeting guidelines used by public entities.