

## THE PUBLIC SERVICE SECTOR EDUCATION TRAINING AUTHORITY

### Terms of Reference

#### THE APPOINTMENT OF SERVICE PROVIDER FOR THE PROVISION OF BUSINESS CONTUINTY SERVICES AND UPDATE OF THE BCM PROGRAMME FOR PSETA FOR A DURATION OF THREE (03) YEARS

**No late applications will be accepted**

**Board members:** Mr T Tshefuta (Chairperson) | Ms C Brink | Mr L Nzimande  
Mr NN Maesela | Mr PB Makhafane | Mr MI Napo  
Ms T Molefe-Sefanyetso | Mr PB Moopelwa | Ms L Dludla | Ms N Nzimande  
Ms N Silinyana | Mr M Ramakgale

**CEO:** Ms B Lerumo



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## **1. INTRODUCTION**

The Public Service Sector Education and Training Authority (PSETA) is a Sector Education and Training Authority (SETA) established in terms of section 9(1) of the Skills Development Act 97 of 1998 as amended and is classified as a National Public Entity under schedule 3A of the Public Finance Management Act, 1 of 1999.

PSETA Business Continuity Management is an integral part of the PSETA's Risk Management processes. PSETA is committed to a process of BCM that is aligned to the principles of International Standard ISO22301, and best practices as espoused by the Business Continuity Institute (BCI).

BS 25999-1 Part 1: Code of Practice and BS 25999-2 Part 2: Specification as well as the Business Continuity Institute's Good Practice Guidelines, Department 1: BCM Policy & Programme Management.

The PSETA intends to appoint a service provider to provide Business Continuity services. The Business Continuity Management Consultant will assist the PSETA in reviewing and maintaining Business Continuity Management (BCM) documents for a period of three (3) years.

This document outlines the criteria and requirements for the selection of a suitable service provider for Business Continuity Management Services to PSETA.

## **2. BACKGROUND & CONTEXT**

The PSETA occupies two floors at 177 Dyer Road, Hillcrest Pretoria and is implementing BCM. The BCM Programme is outsourced due to capacity constraints. PSETA has Business

Continuity Management (BCM) documents that are due for an annual review, update and continued maintenance.

The required BCM services are from the date of contracting and shall continue for the period of 36 months, with fees payable in phases and maintenance for the subsequent years on an agreed basis. The documents may be updated as and when required.

### **3. SCOPE OF WORK**

The BCM required is to cover the PSETA as an ongoing business concern against any unforeseen disruptions that may result due to unforeseen risks including natural risks, theft, damage, fire, and related risks that may result in complete or partial disruption of operations. The services for which a quotation is for the review of the following documents:

#### **3.1. BCM Policy** including:

- a. BCM Business Impact Assessment (annually)
- b. BCM Strategy (annually)
- c. BCM Plans (annually):
  - i. Crisis Management Plan
  - ii. Emergency Response Plan
  - iii. Business Recovery Plan
  - iv. ICT Disaster Recovery Plan
  - v. ICT Continuity Plan
- d. Departmental Plans for PSETAs 12 Departments (annually) as mentioned in section f.
- e. In addition, the quotation must also include the review/facilitation of the following:
  - i. BCM Threat Assessment (annually)
  - ii. BCM Training and Awareness (bi-annually)
  - iii. BCM Simulation Exercise (bi-annually)
  - iv. BCM Rehearsal Exercise (bi-annually)

- f. The BCM Plans are required to be undertaken for the following departments:
- i. Skills Planning and Research
  - ii. Learning Programmes
  - iii. Quality Assurance
  - iv. Projects
  - v. Human Capital Management
  - vi. Legal Services
  - vii. Stakeholder Management and Communications
  - viii. Information and Communication Technology
  - ix. Facilities and Logistics Management
  - x. Financial Management
  - xi. Supply Chain Management
  - xii. Office of the CEO
    - Strategy, Monitoring and Evaluation
    - Board Secretary
    - Policy, Risk and Compliance Management
    - Internal Audit
- g. The service to be rendered over the agreed upon period should include general services related to the maintenance, and administration of the BCM programme.
- h. Keep PSETA to date with latest BCM updates through, training and awareness, simulation and rehearsal exercises when required and necessary.

### **3.2. RATIONALE AND PURPOSE**

The review is to ensure that there is systematic approach required within the BCM programme to help PSETA maintain a consistent level of output during a period of disruption.

The objectives of the updates are to:

- a. Up to date business continuity strategies
- b. Ensure continuity or uninterrupted provision of operations and services in the event of a disaster.
- c. Efficient and effective planning to assure continuous business processes through, for instance, disaster recovery, business recovery, business resumption and contingency planning.

#### **4. METHODOLOGY AND APPROACH**

The BCM Consultant service provide will undertake the following:

- a. Review PSETA's BCM documents to ensure alignment with best practice.
- b. Review PSETA's BCM documents to ensure alignment with latest International Organizational Standards (ISO): ISO22301 and 27301.
- c. Review PSETA's BCM documents to ensure alignment with Business Continuity Institute (BCI) Guidelines 2013.
- d. Applies a practical, hands-on simulation, rehearsal, and testing techniques.
- e. Delivers working capability, and its maintenance, not just paper plans.

#### **5. COMPETENCY AND EXPERTISE**

The BCM Consultant must meet the following requirements for eligibility:

- a. Business Continuity Experience and Certified Business Continuity Professional (**CBCP**), or Certified Functional Continuity Professional (**CFCP**), and /or Master Business Continuity Professional (**MBCP**), as an advantage - CVs must be submitted showing copies of certification and years' experience.
- b. The Project manager/ team leader must have BCM experience with a minimum Certificate of the Business Continuity Institute (CBCI) - CVs must be submitted showing copies of certification and years' experience.

- c. Project management experience familiar with project management concepts and project organization.
- d. Demonstrated facilitation, development, or participation experience in BCM mock and real exercises.

## **6. TIMELINES OF THE CONTRACT**

The period for this assignment is three (3) years, commencing from the date of signing the Service Level Agreement.

## **7. QUALITY AND REPORTING REQUIREMENTS**

The BCM Service provider will report directly to the Senior Specialist: Policy, Risk and Compliance Management or to the delegated representative, as and when required.

## **8. PRICING**

The proposed total pricing must be inclusive of VAT. The PSETA may require a breakdown of rates on any of the services/items priced and BCM providers are required to provide the same. The PSETA reserves the right to negotiate the selection/prioritization of deliverables in line with the contract price.

## **9. EVALUATION PROCESS**

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goals, once the minimum functionality criteria are met.

## PHASE 1: FUNCTIONALITY EVALUATION

Bids must meet the minimum eligibility criteria in respect of functionality of 75 points out of a 100 points that will be awarded for functionality before they are considered further. Any bid that does not meet the minimum eligibility threshold will be automatically disqualified.

## PHASE 2

The bids will be evaluated on the 80/20 principle with 80 points being allocated for price and 20 points allocated for specific goal, once the minimum functionality criteria are met.

The evaluation will be based on:

<b>Phase 1: Functionality Evaluation</b>		
<b>Phase 2: Preferential Point System</b>	<b>Points allocated for specific goals</b>	<b>Points</b>
Price		<b>80</b>
<b>Special goals</b>		<b>20</b>
Black owned company	8	
Women	4	
Youth	5	
Disability	3	
<b>Total</b>		<b>100</b>



9.1.1 The functionality criteria together with the maximum points to be awarded are set out below:

**Phase 1**

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
1.	Project Plan	<ul style="list-style-type: none"> <li>• Proposal with Project plan displaying an understanding of SA Public service and PSETA BCM Policy and best practices</li> <li>• Demonstrate practical methodologies highlighting project structure and implementation.</li> <li>• Detailed in-depth project plan detailing timeframes for the project, activity-based plan, detailed activity-based budget (including costing for travel, disbursements, incidental costs, accommodation) and quality assurance plan.</li> </ul>	<p>1 = Proposal and project plan not acceptable (all areas not covered).            2 = Poorly written proposal and project plan (few areas covered)            3 = Average proposal (most areas covered)            4 = Good proposal (all areas covered but not in depth)            5= Excellent detailed proposal (all areas thoroughly addressed in depth)</p>	30
	Professional Body and ISO Accreditation/Registration	Registration of the team members with professional bodies and company registration with ISO	<p>1= no professional body and ISO registration            2 = 1 member has a professional body, and the company has no ISO registration            3= 2 members have a professional body, and the company has ISO registration            4= 3 members have a professional body,</p>	20

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	SCORE GUIDE	WEIGHT
			and the company has ISO registration 5= 4 or more members have a professional body, and the company has ISO registration	
2.	History of successful delivery of the same or similar project(s).	Provide reference Letters:  Reference letters must be on company letterhead, signed and dated, otherwise, they will not be considered.	1= 0 references in the past five years 2= one (1) to two (2) relevant reference in the past five years 3= three (3) references in the past five years 4= four (4) references in the past five years 5= five (5) references and above in the past five years	10
3.	Experience of the BCM Consultant in the field of BCM.	Number of years of experience in the field of providing BCM Solutions. A detailed CV of the Lead Consultant and team must be submitted.	<ul style="list-style-type: none"> <li>• 1= No submission of CV in experience</li> <li>• 2= CV, and less than 5years in experience</li> <li>• 3 = CV, a minimum of 5 years in experience with Qualification</li> <li>• 4 = CV and a minimum of 6 to 9 years in experience</li> <li>• 5 = CV with 10 years and above in experience</li> </ul>	40
	<b>Total</b>			<b>100</b>

## 10. FORMAT OF THE BID SUBMISSION

- 10.1. Company profile indicating all the requirements as per the evaluation criteria.
- 10.2. Proposals must be submitted in 3 copies, 1 original and 2 copies.
- 10.2. Team member names and roles.
- 10.3. CVs and certified copies of qualifications.
- 10.4. Track record and experience. Three signed reference letters of similar work reflect clients' telephone numbers and links or images of the work.
- 10.5. A valid Tax compliance status (TCS) PIN or proof of exemption from SARS.
- 10.6. Certified copy of BB-BEE certificate or affidavit
- 10.7. Copy of the registration document of the organisation (CIPC);
- 10.8. All Standard Bidding Documents (SBD) must be completed and signed.
  - SBD 1
  - SBD 4
  - SBD 6.1
  - Proof of registration on the Central Supplier Database.
  - General Condition of Contract (each page signed)

**NB: Failure to submit documents requested in section 10.8 will disqualify the proposal.**

Bid proposals must be submitted to:

Ms Ursula Mathonsi

Manager: Supply Chain Management

The PSETA

Ground Floor, Woodpecker Building, Hillcrest Office Park, Lynwood, Pretoria

No late applications will be accepted.

**No electronic bid applications will be accepted.**

The Validity periods of the bids is 90 days from the closing date. Please direct all queries to Ms. Ursula Mathonsi via email on [ursulam@pseta.org.za](mailto:ursulam@pseta.org.za) or telephonically on 012-4235700