



TERMS OF REFERENCE:

APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE TRAINING ON MS EXCEL FOR FINANCE PROFESSIONALS

This document outlines the Terms of Reference (TOR) for appointing a service provider to deliver training on Intermediate and Advanced Microsoft Excel for the HSRC finance professionals (Finance unit).

1. Introduction and background

The HSRC seeks to secure the services of an experienced service provider to offer virtual training on Intermediate and Advanced Microsoft Excel for its finance professionals (Finance unit).

2. Scope of work:

The service provider will be expected to:

1. Design a customised training programme aligned to HSRC's needs and the public sector finance environment.
2. Deliver interactive training sessions (virtual).
3. Include case studies, group activities, and assessment tools.
4. Provide training materials (manuals, presentations, templates).
5. Conduct a pre-training needs assessment and post-training evaluation.
6. Submit a comprehensive training report with recommendations for ongoing support or follow-up training.

3. Target Audience:

1. HSRC finance unit
2. Estimated number of participants (23): (12 Intermediate) (11 Advanced)
3. Training may be offered in one or more cohorts.

4. Deliverables:

The service provider is expected to deliver:

1. Training needs assessment summary (pre-training).
2. Customised training programme outline.
3. Training delivery (3 days).
4. Participant manuals and resource materials.
5. Post-training evaluation results and analysis.
6. Final report with recommendations.
7. Provide certificates of attendance and attendance register
8. Ability to offer the three day workshop during the month of October 2025

5. Standard Requirements:

- The bidder must provide a company profile demonstrating experience in conducting training on Ms Excel. The profile must demonstrate a list of clients for similar services and the years the services were provided (services must not be older than five years).
- The facilitator who will be allocated to the HSRC must have a relevant qualification with a minimum NQF (National Qualification Framework) 7 and must have a minimum of 5 years of experience in offering Ms Excel training. The experience must be demonstrated by the provision of a recently updated CV.
- The bidder must submit a comprehensive technical proposal where the bidder is required to demonstrate an understanding and response to the scope of work, methodology, implementation plan, and the approach to how the project will be managed through its entire life cycle.

- Service Provider must provide a Course Outline and Sample of Course content to demonstrate what the training courses will cover.
- The bidder should be registered with any of the SETA's or accredited Higher Education Institute and must provide valid proof.

EVALUATION CRITERIA TO APPOINT THE SERVICE PROVIDER

The following criteria will be applied in procuring a suitable service provider:

<p>1. Experience</p> <p>1.1 The service provider performing the assignment should have at least a 5 year track- record in offering training on Ms Excel. The bidder must provide a company profile demonstrating experience in conducting training on Ms Excel. (15)</p> <table border="1" data-bbox="337 947 826 1096"> <tr> <td>5-10 years' experience</td><td>5 points</td></tr> <tr> <td>11-15 years' experience</td><td>10 points</td></tr> <tr> <td>16 and more</td><td>15 points</td></tr> <tr> <td></td><td></td></tr> </table> <p>1.2 The portfolio of evidence must include :</p> <ul style="list-style-type: none"> • Three relevant and signed reference letters from different companies, telephone numbers and e-mail addresses from companies who can attest to the service provider's experience in facilitating Ms Excel workshops. (15) <table border="1" data-bbox="337 1465 826 1789"> <tr> <td>1 relevant and signed contactable reference letter</td><td>5 points</td></tr> <tr> <td>2 relevant and signed contactable reference letters</td><td>10 points</td></tr> <tr> <td>3 relevant and signed contactable reference letters</td><td>15 points</td></tr> </table>	5-10 years' experience	5 points	11-15 years' experience	10 points	16 and more	15 points			1 relevant and signed contactable reference letter	5 points	2 relevant and signed contactable reference letters	10 points	3 relevant and signed contactable reference letters	15 points	<p>30</p>
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<p>2. Methodology:</p> <p>2.1 The service provider must demonstrate a clear understanding of the assignment by outlining the objectives, context and outcomes expected by the HSRC.</p> <p>This should include a detailed explanation of the below listed elements that will be used to facilitate the workshop showing clarity and insight into the delivery of the program:</p> <p>2.1.1. the approach (including implementation plan) (25)</p> <p>2.1.2. resources that will be used to facilitate the workshop (25)</p> <table border="1" data-bbox="337 1591 826 1770"> <tr> <td>Poor Proposal</td><td>0</td></tr> <tr> <td>Average Proposal</td><td>1-10</td></tr> <tr> <td>Good Proposal</td><td>11-15</td></tr> <tr> <td>Excellent Proposal (all elements addressed)</td><td>16-25</td></tr> </table>	Poor Proposal	0	Average Proposal	1-10	Good Proposal	11-15	Excellent Proposal (all elements addressed)	16-25	<p>50</p>
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<p>3. Capacity</p> <p>3.1 The facilitator should have not less than 5 years' experience in offering Ms Excel training (Detailed CV of Facilitator). (20)</p> <table border="1"> <tr> <td>5 years' experience</td><td>5 points</td></tr> <tr> <td>6-10 years' experience</td><td>10 points</td></tr> <tr> <td>11years and more</td><td>20 points</td></tr> <tr> <td></td><td></td></tr> </table>	5 years' experience	5 points	6-10 years' experience	10 points	11years and more	20 points			20
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Minimum Threshold percentage: 70%

Enquiries (not applications or CVs) may be directed to Ms Liziwe Cwati at lcwati@hsrc.ac.za, tel. 012 302 2605