

REQUEST FOR EXPRESSION OF INTEREST (EOI)

Title of the EOI: Track and Tracer Study for unemployed persons —2024-25	
Date of this EOI: 24/01/2025	Closing Date for Receipt of EOI: 04/02/2025
EOI Reference Number: HWSETA-24/25 EvalResearch-0001	
Service Category: Evaluation Research	
Address EOI response by e-mail to the Attention of: Johanna Ledwaba	
Email address: johannal@hwseta.org.za	

TERMS OF REFERENCE FOR THE TRACK AND TRACER OF UNEMPLOYED LEARNERS 2024/25

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1. BACKGROUND & CONTEXT

The Health and Welfare Sector Education Training Authority (HWSETA) facilitates skills development in the Health and Welfare sectors. HWSETA, as mandated by the Skills Development Act no 97 of 1998, is responsible for funding and facilitating education, training, and skills development interventions to the workforce of the Health and Welfare development sectors. The ultimate goal of these interventions is to close the skills gap in the Health and Welfare sector by increasing employability for the unemployed and career progression for those already employed. Furthermore, the HWSETA carries a responsibility of evaluating the outcome of the education, training, and skills development interventions. To this end, the HWSETA has been conducting the track and tracer study to assess learner pathways upon completion of their programmes. The track and trace study is conducted annually through telephonic and online survey by an external service provider. We are currently calling for a capable service provider with experience in data collection for research purposes using Computer Assisted Telephonic interviews (CATI) surveys to conduct the telephonic survey and online survey for 2024/25.

2. RATIONALE AND PURPOSE

A request for proposals from service providers to conduct a telephonic and online survey on tracking and tracing learners in the following HWSETA-funded learning programmes:

- Post-Graduate Bursary
- Under-Graduate Bursary
- Vocational bursary
- Graduate Internships
- Learnerships
- Apprenticeships

The project will serve to understand, explore, and document key features, trends, challenges, and outcomes of skills interventions in the Health and Welfare sectors. Fundamentally, the research project will assist in further developing a sustainable skills development strategy for the HWSETA. This would contribute positively to the HWSETA sectors and promote inclusive economic growth in the country.

The primary focus of the study is to understand the outcomes of workplace-based learning (WBL) through the tracking and tracing of learners supported within the health and welfare sector. The main purposes of the assignment will be to provide the HWSETA with information regarding the activities of learners who have completed HWSETA programmes. Tracer studies are designed to determine whether a programme is achieving its mission and assist in demonstrating the programme's outcomes.

3. GOAL

The goal of the study is to identify number of unemployed persons who find employment after successfully completing HWSETA funded skills development programmes.

This study therefore aims to identify and map career pathways¹ created by qualifications funded by skills development programmes of the HWSETA targeting the unemployed.

4. OBJECTIVES

The study should, therefore, address the following related objectives:

1. To determine the utilisation of qualifications obtained by HWSETA funded graduates² in terms of career pathways.
2. To determine the nature of the employment received by HWSETA funded graduates.
3. To determine the utilisation of qualifications obtained by of HWSETA funded graduates in terms of progressing on to further studies³.
4. To determine graduate perceptions of HWSETA funded graduates of learning programmes they were exposed to.

5. SPECIFIC RESEARCH QUESTIONS

The research study seeks to answer the following specific questions:

1. What are the qualifications obtained by HWSETA funded graduates utilised for:
 - Finding employment?
 - Venturing into self-employment?
 - Furthering studies?

¹ A career path is the sequence of jobs or positions through which an individual progresses in their professional life.

² HWSETA funded graduate is a learner who completes a HWSETA funded learning programmes.

³ Further study means progressing to a qualification at a higher NQF level which strengthens access into occupations or to a qualification at the same NQF level giving access into a new field of study and occupation.

2. For those that found employment, what is the nature of the employment received:

- Where are they employed?
- What is their occupation?
- Are they employed full-time or part-time or temporary?
- What are their wages?
- What benefits and allowances are they getting?

3. For those that are self-employed, what is the nature of their self-employment:

- What are the reasons for choosing this route to employment?
- What type of business or organisation have you registered?
- What is the size of the organisation?
- What are its prospects of sustainability?

4. For those that do not find employment:

- What challenges do they face that impede them from finding employment?
- Are they looking for employment?

6. For those that do progress into further studies:

- Did they progress into qualifications at a higher NQF level?
- Did they progress into qualifications at a same NQF level?
- Did they progress into qualifications at a lower NQF level?
- Did they gain entry into qualifications at a different field?

7. SCOPE OF WORK

The service provider will be required to:

- Conduct an empirical research project on tracking and tracing learners by interviewing them telephonically and/or through online survey, a sample of **1333 learners** who have completed the HWSETA learning programmes and SAW and CYC learnerships.
- Programme or script two questionnaires already designed by HWSETA on CATI software. This software should have the capability of capturing data as it is collected. There will be two questionnaires, the first including all HWSETA WBL programmes and the second including SAW and CYC learnerships. Both questionnaires are

estimated to be approximately 20 minutes. A respondent might only be eligible to complete a subset of the questionnaire depending on their current status; for examples if the learner is unemployed, they will answer a few questions pertaining to employment and will not answer the questions about unemployment or furthering their studies. A learner will answer all the questions if they are employed and currently furthering their studies.

- Conducting telephonic interviews based on scripted questionnaires with a specified sample of learners who have completed HWSETA learning programmes. A comprehensive database of a sample of **833 learners** who completed learnerships, internships, Bursary and apprenticeships and a sample of **500 learners** who completed the SAW and CYC learnership will be provided.
- Follow the sampling guidelines provided by the SETA to ensure a stratified random sample of completers.
- Deliver a database from the interviews and scripted questionnaires using the tools and templates provided by the HWSETA.
- Provide labelled audio's for each learner contacted; this should include both the successful and unsuccessful interviews.
- Produce a technical/fieldwork report based on a template provided by the HWSETA.
- Conduct data analysis based on the analytical framework provided by the HWSETA.
- Prepare and submit an evaluation report against key outcome indicators using a template provided by the SETA.

8. COMPETENCY AND EXPERTISE REQUIREMENTS

The successful bidder must have the following competencies:

FUNCTIONAL CRITERION	KEY COMPONENTS	MAXIMUM POINTS AVAILABLE												
1. Capacity and detailed methodology of delivery	<p>1.1 Have proven capacity to undertake a project of this nature and to complete the project by the due date.</p> <ul style="list-style-type: none"> ▪ Full description of the functionality of the CATI system and online survey [10pts]. ▪ Each detailed functionality below will be scored up to 1,5 points. <table border="1" data-bbox="300 1758 1318 1960"> <thead> <tr> <th data-bbox="300 1758 539 1926">Management of personal information in accordance with the POPIA</th> <th data-bbox="547 1758 715 1926">CATI system and software to be used.</th> <th data-bbox="722 1758 882 1926">Provision and labelling of audios.</th> <th data-bbox="890 1758 1034 1926">Quality control process</th> <th data-bbox="1042 1758 1169 1926">Data storage and backups</th> <th data-bbox="1177 1758 1318 1926">Online survey capabilities</th> </tr> </thead> <tbody> <tr> <td data-bbox="300 1937 539 1960">1,5 points</td> <td data-bbox="547 1937 715 1960">1,5 points</td> <td data-bbox="722 1937 882 1960">1,5 points</td> <td data-bbox="890 1937 1034 1960">1,5 points</td> <td data-bbox="1042 1937 1169 1960">1,5 points</td> <td data-bbox="1177 1937 1318 1960">1,5 points</td> </tr> </tbody> </table>	Management of personal information in accordance with the POPIA	CATI system and software to be used.	Provision and labelling of audios.	Quality control process	Data storage and backups	Online survey capabilities	1,5 points	1,5 points	1,5 points	1,5 points	1,5 points	1,5 points	20 points
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1,5 points	1,5 points	1,5 points	1,5 points	1,5 points	1,5 points									

	<p>1.2 Organizational Structure and Function</p> <ul style="list-style-type: none"> The service provider must submit the following information in the following manner for least three (3) of the fieldworkers/CATI Operators: <table border="1" data-bbox="303 443 1316 645"> <thead> <tr> <th>Name and Surname</th> <th>Title</th> <th>Be able to speak at least 3 SA official languages fluently</th> <th>At least 3 years of Experience in conducting CATI interviews</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>One or two languages = 2pts Three or more languages = 5 pts</td> <td>One- or two-years' experience= 2pts Three or more years' experience= 5 pts</td> </tr> <tr> <td>Total</td> <td></td> <td>5</td> <td>5</td> </tr> </tbody> </table> <p>IMPORTANT: Please copy the table onto your proposal that you will be submitting.</p> <ul style="list-style-type: none"> The service provider must provide CVs of all team members listed on the table above. All team members must have at least 3 years' experience in conducting CATI interviews. All team members must be able to speak at least 3 SA official languages fluently. Table above not provided on the proposal detailing at least 3 the team members = [0] The table completed with less than 3 team members = [0] 	Name and Surname	Title	Be able to speak at least 3 SA official languages fluently	At least 3 years of Experience in conducting CATI interviews			One or two languages = 2pts Three or more languages = 5 pts	One- or two-years' experience= 2pts Three or more years' experience= 5 pts	Total		5	5														
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<p>2. Project Implementation</p>	<p>Core team [scripter, data analysis, report writing]</p> <table border="1" data-bbox="303 1025 1316 1366"> <thead> <tr> <th>Role in the project</th> <th>Name and Surname</th> <th>Title</th> <th>At least 3 years of experience in evaluation research</th> <th>At least 3 years of experience in your role</th> </tr> </thead> <tbody> <tr> <td>Scripter of the question naire</td> <td></td> <td></td> <td>1-2yrs experience = 2pts 3 or more yrs experience = 5 pts</td> <td>1-2yrs experience = 2pts 3 or more yrs experience = 5 pts</td> </tr> <tr> <td>Data analysis</td> <td></td> <td></td> <td>1-2yrs experience = 2pts 3 or more yrs experience = 5 pts</td> <td>1-2yrs experience = 2pts 3 or more yrs experience = 5 pts</td> </tr> <tr> <td>Report writing</td> <td></td> <td></td> <td>1-2yrs experience = 2pts 3 or more yrs experience = 5 pts</td> <td>1-2yrs experience = 2pts 3 or more yrs experience = 5 pts</td> </tr> <tr> <td>Total</td> <td></td> <td></td> <td>5</td> <td>5</td> </tr> </tbody> </table> <p>IMPORTANT: Please copy the table onto your proposal that you will be submitting.</p> <ul style="list-style-type: none"> The service provider must provide CVs of all team members listed on the table above. Table above not provided on the proposal = [0] Overall core team score will be averaged = [10] 	Role in the project	Name and Surname	Title	At least 3 years of experience in evaluation research	At least 3 years of experience in your role	Scripter of the question naire			1-2yrs experience = 2pts 3 or more yrs experience = 5 pts	1-2yrs experience = 2pts 3 or more yrs experience = 5 pts	Data analysis			1-2yrs experience = 2pts 3 or more yrs experience = 5 pts	1-2yrs experience = 2pts 3 or more yrs experience = 5 pts	Report writing			1-2yrs experience = 2pts 3 or more yrs experience = 5 pts	1-2yrs experience = 2pts 3 or more yrs experience = 5 pts	Total			5	5	<p>10 points</p>
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Total			5	5																							
<p>3. Professional Qualifications of the Evaluation Team</p>	<p>The project team leader and at least 2 of the team members (core team) from the tables above should be in possession of the following qualifications.</p> <ul style="list-style-type: none"> Team Leader's Qualifications (1 person): Master's degree in social sciences or health related qualification = [10] Doctoral Degree in Social Science or Health related qualification = [15] Core Team Members Qualifications (at least 2): Honours Degree in Social Sciences or Health related qualification = [10] Master's degree in social sciences or health related qualification = [20] Fieldworkers Qualifications (at least 2): Matric or above = [5] Below matric= 0 	<p>40 points</p>																									

	<p>Please provide certified copy of the qualifications listed the certified date must not be more than 6 months.</p> <p>No submission of qualifications = [0]</p> <p>Submitted qualifications for the team leader below the master's degree and below honours for core team members = [0]</p> <p><i>International qualifications must be verified by SAQA and a copy of letters confirming verification</i></p>											
<p>4. Experience</p>	<p>The proven track record for conducting similar studies</p> <table border="1" data-bbox="300 667 1311 918"> <thead> <tr> <th>critrion</th> <th>score</th> </tr> </thead> <tbody> <tr> <td>Reference letters</td> <td> <p>The service provider must submit a minimum of 2 reference letters with contactable references in provision of evaluation research services.</p> <p>The reference letter should be between 2017 and 2024.</p> <p>For a reference letter to be valid it must be dated and signed.</p> <p>Less than two reference letters = [0]</p> <p>Minimum 2 reference letters = [10]</p> <p>At least one letter must confirm the use of CATI tool for data collection = [20]</p> </td> </tr> </tbody> </table> <p>Each reference letter must have the following to meet the minimum requirements.</p> <table border="1" data-bbox="300 967 1311 1191"> <thead> <tr> <th>Key elements of the reference letter</th> </tr> </thead> <tbody> <tr> <td>It must be dated</td> </tr> <tr> <td>It must specify the research project study undertaken</td> </tr> <tr> <td>It must be signed</td> </tr> <tr> <td>The organization, position, and contact details of the signatory must be stated</td> </tr> <tr> <td>At least one letter must confirm the use of CATI tool for data collection</td> </tr> </tbody> </table>	critrion	score	Reference letters	<p>The service provider must submit a minimum of 2 reference letters with contactable references in provision of evaluation research services.</p> <p>The reference letter should be between 2017 and 2024.</p> <p>For a reference letter to be valid it must be dated and signed.</p> <p>Less than two reference letters = [0]</p> <p>Minimum 2 reference letters = [10]</p> <p>At least one letter must confirm the use of CATI tool for data collection = [20]</p>	Key elements of the reference letter	It must be dated	It must specify the research project study undertaken	It must be signed	The organization, position, and contact details of the signatory must be stated	At least one letter must confirm the use of CATI tool for data collection	<p>30 points</p>
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<p>Subtotal for Functionality (maximum) 100%</p>		<p>100 points</p>										

9. TIMELINES OF THE PROJECT

The duration of the project will be forty (60) working days, across the timeline of 16th February 2025 and 18th April 2025.

10. EXPECTED DELIVERABLES

The service provider will be required to deliver:

- Two scripted questionnaires for review and approval.
- Successful and unsuccessful interview audios
- Two fieldwork reports.
- Raw and cleaned data analysis files.
- Evaluation report.

11. QUALITY AND REPORTING REQUIREMENTS

The service provider will report directly to the Monitoring and Evaluation Officer and Monitoring and Evaluation Manager, as and when required. The service provider must oversee the general management of the service and performance.

12. PRICING

- The proposed project pricing must be all inclusive of VAT.
- The HWSETA may require a breakdown of rates on any of the items priced and service providers are required to provide same.
- The HWSETA reserves the right to negotiate the selection/prioritisation of deliverables in line with the contract price.

There will be two questionnaires with different sample sizes, please provide a cost indication separately for each.

Quote1: A database of 833 learners with a questionnaire length of approximately 20 minutes.

ACTIVITY		COST
Programming or scripting the questionnaire		
Training of data capturers		
Conducting telephonic interviews (20 minutes per interview)	Programme	
	Apprenticeship	53
	UG Bursary	31
	PG Bursary	70
	Internship	63
	Learnership	574
	Vocational Bursary	42
	Total	833
Consolidation, cleaning, validation, and submission of captured data		
Storage, retrieval, labelling, and submission of audios		
Fieldwork report		
Data analysis and Evaluation Report		
TOTAL COST		

Quote2: A database of 500 learners with a questionnaire length of approximately 20 minutes.

ACTIVITY			COST
Programming or scripting the questionnaire			
Training of data capturers			
Conducting telephonic interviews <i>(20 minutes per interview)</i>	Programme	Participants	
	SAW learnership		
	CYC learnership		
	Total	500	
Consolidation, cleaning, validation, and submission of captured data			
Storage, retrieval, labelling, and submission of audios			
Fieldwork report			
TOTAL COST			

Please, note that data collection will have two questionnaires, and quote should be provided for each questionnaire and sample size.

13. MANDATORY REQUIREMENTS

- Company registration documents
- Service provider's business address
- Service provider's contact person (name, email address, and telephone number)
 - Proof of registration on the Central Supplier Database (attached relevant documents)
 - Signed POPI Consent (**Refer to Annexure A**)

ANNEXURE A: CONSENT IN TERMS OF SECTION 11 OF THE PROTECTION OF PERSONAL INFORMATION ACT, 2013 (“POPIA”)

In order for the Health and Welfare Sector Education and Training Authority (“HWSETA”) to consider

the bidder’s response to the advertisement to become a service provider of the HWSETA, it will be necessary for the HWSETA to process certain personal information which the service provider may share with the HWSETA for the purpose of the bid, including personal information.

The HWSETA will process the Service Provider’s Personal Information in accordance with its Privacy Policy. Access to your Personal Information and purpose specification: Personal Information will be processed by the HWSETA for purposes of assessing the service provider’s submission in relation to the advertised EOI and the purposes of assessing current services required by HWSETA. We may also share the service provider’s Personal Information with third parties within the Republic of South Africa, including to carry out verification and background checks. In this regard, the service provider acknowledges that the HWSETA’s authorised verification agent(s) and service providers will access Personal Information and conduct background screening.

Consent: By [ticking] "Yes" and signing below, you agree and voluntarily consent to the HWSETA's processing of your Personal Information for the purposes of evaluation, including to confirm and verify any information provided in the submission and service provider gives HWSETA permission to do so. The service provider understands that it is free to withdraw its consent on written notice to HWSETA and the service provider agrees that the Personal Information may be disclosed by HWSETA to third parties. Please note that if you withdraw your consent at any stage, we may be unable to process your bid submission.

Yes No

Supplier Name

Date

Signature