

### REQUEST FOR EXPRESSION OF INTEREST (EOI)

<b>Title of the EOI: Track and Tracer Study of Workers – 2024-25</b>	
<b>Date of this EOI:</b> 24/01/2025	<b>Closing Date for Receipt of EOI:</b> 11/02/2025
<b>EOI Reference Number:</b> HWSETA-24/25 EvalResearch-0003	
<b>Service Category:</b> Evaluation Research	
<b>Address EOI response by e-mail to the Attention of:</b> Johanna Ledwaba	
<b>Email address:</b> johanna@hwseta.org.za	

# TERMS OF REFERENCE FOR THE TRACK AND TRACER STUDY FOR WORKERS 2024/25

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## **1. BACKGROUND & CONTEXT**

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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 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. The HWSETA also funds workers that participate in the recognition of prior learning programme. As a result, 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 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 and online survey for 2024/25.

## **2. RATIONALE AND PURPOSE**

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

- Under-graduate Bursary for Workers
- Post-graduate Bursary for Workers
- Learnership for Workers
- Artisanship for Workers

The project will serve to understand, explore, and document key features, trends, challenges, and outcomes of skills interventions in the Health and Welfare sectors. Profoundly, the evaluation 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 focus of the study is to understand the outcomes of the learning programmes 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 SETA 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 OF THE STUDY**

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This study aims to identify and map employment career pathways<sup>1</sup> undertaken by workers after successfully completing HWSETA funded learning programmes.

### **4. OBJECTIVES**

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

1. To determine whether the obtained qualification has provided career progression<sup>2</sup>.
2. To determine whether the qualification has improved worker competency.
3. To determine the change in salary/wage after obtaining the qualification.
4. To determine the utilisation of the qualification after completion.
5. To determine learner perceptions towards the programme.

### **5. SPECIFIC RESEARCH QUESTIONS**

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The research study seeks to answer the following specific questions:

1. How has the qualification enhanced the worker's careers?
  - a. Changed jobs, either vertically or horizontally?
  - b. Continue with the job they already had?
  - c. Got a promotion?
  - d. Increase in earnings?
2. Have the skills and knowledge improved competence in the current employment?
3. Have workers enrolled in a higher qualification than the one recently obtained?

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<sup>1</sup> An employee career pathway is a roadmap for an employee's career progression within their company or externally.

<sup>2</sup> Career progression is the process of climbing the ladder during your working life. Moving forward, being promoted, finding new challenges, new employers, new opportunities and getting the most out of one's career.

## **6. SCOPE OF WORK**

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The service provider will be required to:

- Conduct an empirical research project on tracking and tracing learners by interviewing, telephonically, a total of **260 learners** who completed qualifications funded through under-graduate and post-graduate bursaries, Artisanship and Learnerships.
- Programme or scripted questionnaire has already been designed by the HWSETA. This should be used as a data collecting tool. The questionnaire is estimated to be approximately 10-15 minutes. A respondent might only be eligible to complete a subset of the questionnaire depending on their status; for examples if the learner is not studying further, they will answer a few questions pertaining to their employment and will not answer the questions about furthering their studies.
- Conducting telephonic interviews based on a scripted questionnaire with a specified number of learners who have completed qualifications funded through the bursary, artisanship and learnership programme. A comprehensive database of a total of **260 learners** who have completed the bursary, artisanship and learnership programme.
- 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 track and trace 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.

## **7. COMPETENCY AND EXPERTISE REQUIREMENTS**

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The successful bidder must have the following competencies:

FUNCTIONAL CRITERION	KEY COMPONENTS	MAXIMUM POINTS AVAILABLE																									
<p>1. Capacity and detailed methodology of delivery</p>	<p><b>1.1 Have proven capacity to undertake a project of this nature and to complete the project by the due date.</b></p> <ul style="list-style-type: none"> <li>▪ Full description of the functionality of the CATI system and/or online survey [10pts].</li> <li>▪ Each detailed functionality below will be scored up to 1,5 points.</li> </ul> <table border="1" data-bbox="300 539 1318 741"> <thead> <tr> <th>Management of personal information in accordance with the POPIA</th> <th>CATI system and software to be used.</th> <th>Provision and labelling of audios.</th> <th>Quality control process</th> <th>Data storage and backups</th> <th>Online survey capabilities</th> </tr> </thead> <tbody> <tr> <td>1,5 points</td> <td>1,5 points</td> <td>1,5 points</td> <td>1,5 points</td> <td>1,5 points</td> <td>1,5 points</td> </tr> </tbody> </table> <p><b>1.2 Organizational Structure and Function</b></p> <ul style="list-style-type: none"> <li>▪ The service provider must submit the following information in the following manner for <b>least three (3) of the fieldworkers/CATI Operators:</b></li> </ul> <table border="1" data-bbox="300 898 1318 1099"> <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><b>Total</b></td> <td></td> <td><b>5</b></td> <td><b>5</b></td> </tr> </tbody> </table> <p><b>IMPORTANT: Please copy the table onto your proposal that you will be submitting.</b></p> <ul style="list-style-type: none"> <li>• The service provider must provide CVs of all team members listed on the table above.</li> <li>• All team members must have at least 3 years' experience in conducting CATI interviews.</li> <li>• All team members must be able to speak at least 3 SA official languages fluently.</li> <li>• Table above not provided on the proposal detailing at least 3 the team members = <b>[0]</b></li> <li>• The table completed with less than 3 team members = <b>[0]</b></li> </ul>	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	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	<b>Total</b>		<b>5</b>	<b>5</b>	<p>20 points</p>	
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<p>2. Project Implementation</p>	<p><b>Core team [ scripter, data analysis, report writing]</b></p> <table border="1" data-bbox="300 1485 1318 1821"> <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 questionnaire</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><b>Total</b></td> <td></td> <td></td> <td><b>5</b></td> <td><b>5</b></td> </tr> </tbody> </table> <p><b>IMPORTANT: Please copy the table onto your proposal that you will be submitting.</b></p> <ul style="list-style-type: none"> <li>• The service provider must provide CVs of all team members listed on the table above.</li> <li>• Table above not provided on the proposal = <b>[0]</b></li> <li>• Overall core team score will be averaged = <b>[10]</b></li> </ul>	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 questionnaire			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	<b>Total</b>			<b>5</b>	<b>5</b>	<p>10 points</p>
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<p><b>3. Professional Qualifications of the Evaluation Team</b></p>	<p><b>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.</b></p> <ul style="list-style-type: none"> <li><b>Team Leader’s Qualifications (1 person):</b> Master’s degree in social sciences or health related qualification = [10] Doctoral Degree in Social Science or Health related qualification = [15]</li> <li><b>Core Team Members Qualifications (at least 2):</b> Honours Degree in Social Sciences or Health related qualification = [10] Master’s degree in social sciences or health related qualification = [20]</li> <li><b>Fieldworkers Qualifications (at least 2):</b> Matric or above = [5] Below matric= 0</li> </ul> <p><b>Please provide certified copy of the qualifications listed the certified date must not be more than 6 months.</b></p> <p><b>No submission of qualifications = [0]</b></p> <p><b>Submitted qualifications for the team leader below the master’s degree and below honours for core team members = [0]</b></p> <p><b>International qualifications must be verified by SAQA and a copy of letters confirming verification</b></p>	<p>40 points</p>										
<p><b>4. Experience</b></p>	<p><b>The proven track record for conducting similar studies</b></p> <table border="1" data-bbox="300 1104 1313 1350"> <thead> <tr> <th>critierion</th> <th>score</th> </tr> </thead> <tbody> <tr> <td>Reference letters</td> <td>The service provider must submit a minimum of 2 reference letters with contactable references in provision of evaluation research services. <b>The reference letter should be between 2017 and 2024.</b> <b>For a reference letter to be valid it must be dated and signed.</b> Less than two reference letters = [0] Minimum 2 reference letters = [10] At least one letter must confirm the use of CATI tool for data collection = [20]</td> </tr> </tbody> </table> <p><b>Each reference letter must have the following to meet the minimum requirements.</b></p> <table border="1" data-bbox="300 1400 1313 1630"> <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>	critierion	score	Reference letters	The service provider must submit a minimum of 2 reference letters with contactable references in provision of evaluation research services. <b>The reference letter should be between 2017 and 2024.</b> <b>For a reference letter to be valid it must be dated and signed.</b> Less than two reference letters = [0] Minimum 2 reference letters = [10] At least one letter must confirm the use of CATI tool for data collection = [20]	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><b>Subtotal for Functionality (maximum) 100%</b></p>		<p><b>100 points</b></p>										

### 8. TIMELINES OF THE PROJECT

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

### 9. EXPECTED DELIVERABLES

The service provider will be required to deliver:

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

## 10. 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.

## 11. 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.
- A database of 260 learners with a questionnaire length of approximately 15-20 minutes.

Please note that data collection will have one questionnaire, and quote should be provided for the questionnaire and sample size

ACTIVITY			COST
Programming or scripting the questionnaire			
Training of data capturers			
Conducting telephonic interviews (20 -25 minutes per interview)	Programme	Participants	
	Employed Under-grad Bursaries		11
	Employed Post-grad Bursaries		28
	Employed Learnership		221
	Employed Artisanship		140
	<b>Total</b>		<b>260</b>
Consolidation, cleaning, validation, and submission of captured data			



Fieldwork Report	
Data Analysis	
Evaluation Report	
Total Cost	

## 12. MANDATORY REQUIREMENTS

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- Company registration documents
- CIP Compliance
- Valid tax pin
- Signed SBD 4 form
- Proof of registration on the Central Supplier Database
- 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 RFQ and the purposes of assessing current services required by the 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 the 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