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| <b>Title of the EOI: NGO/NPO officials relevance evaluation study —2024-25</b> |  |
| <b>Date of this EOI: 24/01/2025</b>  | <b>Closing Date for Receipt of EOI: 04/02/2025</b> |
| <b>EOI Reference Number: HWSETA-24/25 EvalResearch-0007</b>                    |  |
| <b>Service Category: Evaluation Research</b>                                   |  |
| <b>Address EOI response by e-mail to the Attention of: Johanna Ledwaba</b>     |  |
| <b>Email address: johannal@hwseta.org.za</b>                                   |  |

# **TERMS OF REFERENCE FOR NGO/NPO/NPO OFFICIALS RELEVANCE EVALUATION STUDY 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 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 in employment. Additionally, the HWSETA also support non-government organisations (NGO/NPO), by strengthening their governance and service delivery through skills development initiatives.

The HWSETA carries a responsibility of evaluating the education, training, and skills development interventions. This evaluation will focus on interventions targeted to NGO/NPO officials, to assess the relevance of skills development funding programmes that the HWSETA offers to NGO/NPO officials. The evaluation research will conduct track and tracer telephonic interviews with NGO/NPO officials.

We are currently calling for a capable service provider with experience in data collection for research purposes using telephonic surveys.

## **2. RATIONALE AND PURPOSE**

This is a request for proposals from service providers to conduct a telephonic survey on tracking and tracing NGO/NPO officials. The project will serve to understand the extent to which the intervention objectives and design respond to beneficiaries' needs and priorities. Profoundly, the research project will assist in further developing a sustainable skills development strategy for the HWSETA. This will contribute positively to the HWSETA sectors and promote inclusive economic growth in the country.

The purpose of the evaluation is to assess the relevance of skills development funding initiatives that the HWSETA offers to NGO/NPOs.

### **3. OBJECTIVES**

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

1. The extent to which training intervention offered by the HWSETA respond to the identified skills needs and priorities of NGO/NPO officials.
2. The extent to which skills developed are utilised for union agenda.
3. Identify other skills needs of NGO/NPO officials that may be supported by the HWSETA in the future

### **4. SPECIFIC RESEARCH QUESTIONS**

The research study seeks to answer the following specific questions:

1. Have the NGO/NPO officials received training that was prescribed in their training plans?
2. How many training needs have the NGO/NPO officials received from what they have planned in the past two years?
3. To what extent have NGO/NPO officials utilised the skill developed through the support of the HWSETA for union agenda?
4. What other skills needs do NGO/NPO have which may require support from the HWSETA in the near future?

### **5. SCOPE OF WORK**

The service provider will be required to:

- Conduct an empirical research project on tracking and tracing 520 NGO/NPO officials enrolled in the HWSETA-funded skills development programmes by interviewing them via telephone.
- Programme or script questionnaire already designed by HWSETA. This should be used as data collecting tool. The questionnaire is estimated to be approximately 10-15 minutes.
- Conduct telephonic interviews based on a scripted questionnaire with a specified number of officials who have entered the skills development programme. A

comprehensive database of a total of 520 officials who enrolled into the skills development programme will be provided.

- Deliver a database from the interviews and scripted questionnaires using the tools and templates provided by the HWSETA.
- Provide labelled Audio's for each official and 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.

## 6. COMPETENCY AND EXPERTISE REQUIREMENTS

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 [10 pts].</li> <li>▪ Each detailed functionality below will be scored up to 1,5 points.</li> </ul> <table border="1" data-bbox="300 1263 1316 1462"> <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 1621 1316 1821"> <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<br/>Three or more languages = 5 pts</td> <td>One- or two-years' experience= 2pts<br/>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> </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<br>Three or more languages = 5 pts | One- or two-years' experience= 2pts<br>Three or more years' experience= 5 pts | <b>Total</b> |  | <b>5</b> | <b>5</b> | <p>20 points</p> |
| 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<br>Three or more languages = 5 pts  | One- or two-years' experience= 2pts<br>Three or more years' experience= 5 pts |                                    |                            |                          |                            |            |            |            |            |            |            |                  |       |  |  |  |  |  |   |              |  |          |          |                  |
| <b>Total</b>  |  | <b>5</b>  | <b>5</b>  |                                    |                            |                          |                            |            |            |            |            |            |            |                  |       |  |  |  |  |  |   |              |  |          |          |                  |

|  | <ul style="list-style-type: none"> <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>  |                     |  |  |   |   |                                |  |  |  |  |               |  |  |  |  |                |  |  |  |  |              |  |  |          |          |           |
|--|--|---------------------|--|--|---|---|--------------------------------|--|--|--|--|---------------|--|--|--|--|----------------|--|--|--|--|--------------|--|--|----------|----------|-----------|
| <b>2. Project Implementation</b>                             | <p><b>Core team [ scripter, data analysis, report writing]</b></p> <table border="1" data-bbox="300 448 1316 788"> <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<br/>3 or more yrs experience = 5 pts</td> <td>1-2yrs experience = 2pts<br/>3 or more yrs experience = 5 pts</td> </tr> <tr> <td>Data analysis</td> <td></td> <td></td> <td>1-2yrs experience = 2pts<br/>3 or more yrs experience = 5 pts</td> <td>1-2yrs experience = 2pts<br/>3 or more yrs experience = 5 pts</td> </tr> <tr> <td>Report writing</td> <td></td> <td></td> <td>1-2yrs experience = 2pts<br/>3 or more yrs experience = 5 pts</td> <td>1-2yrs experience = 2pts<br/>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 question naire |  |  | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | Data analysis |  |  | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | Report writing |  |  | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | <b>Total</b> |  |  | <b>5</b> | <b>5</b> | 10 points |
| 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<br>3 or more yrs experience = 5 pts | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts |   |   |                                |  |  |  |  |               |  |  |  |  |                |  |  |  |  |              |  |  |          |          |           |
| Data analysis  |  |                     | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts |   |   |                                |  |  |  |  |               |  |  |  |  |                |  |  |  |  |              |  |  |          |          |           |
| Report writing   |  |                     | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts | 1-2yrs experience = 2pts<br>3 or more yrs experience = 5 pts |   |   |                                |  |  |  |  |               |  |  |  |  |                |  |  |  |  |              |  |  |          |          |           |
| <b>Total</b>   |  |                     | <b>5</b>   | <b>5</b>   |   |   |                                |  |  |  |  |               |  |  |  |  |                |  |  |  |  |              |  |  |          |          |           |
| <b>3. Professional Qualifications of the Evaluation Team</b> | <p><b>The project team leader and at least 2 of the team members (core team) from the tables above</b> should be in possession of the following qualifications.</p> <ul style="list-style-type: none"> <li><b>Team Leader's Qualifications (1 person):</b><br/>Master's degree in social sciences or health related qualification = <b>[10]</b><br/>Doctoral Degree in Social Science or Health related qualification = <b>[15]</b></li> <li><b>Core Team Members Qualifications (at least 2):</b><br/>Honours Degree in Social Sciences or Health related qualification = <b>[10]</b><br/>Master's degree or above in social sciences or health related qualification = <b>[20]</b></li> <li><b>Fieldworkers Qualifications (at least 2):</b><br/>Matric or above = <b>[5]</b><br/>Below matric= <b>0</b></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>   | 40 points           |  |  |   |   |                                |  |  |  |  |               |  |  |  |  |                |  |  |  |  |              |  |  |          |          |           |

| <b>4. Experience</b>  | <b>The proven track record for conducting similar studies</b>  | 30 points         |            |       |                   |   |                                      |                  |   |                   |
|---|--|-------------------|------------|-------|-------------------|---|--------------------------------------|------------------|---|-------------------|
|   | <table border="1"> <thead> <tr> <th>critierion</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.<br/> <b>The reference letter should be between 2017 and 2024.</b><br/> <b>For a reference letter to be valid it must be dated and signed.</b><br/>           Less than two reference letters = [0]<br/>           Minimum 2 reference letters = [10]<br/>           At least one letter must confirm the use of CATI tool for data collection = [20]</p> </td> </tr> </tbody> </table> <p><b>Each reference letter must have the following to meet the minimum requirements.</b></p> <table border="1"> <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 | <p>The service provider must submit a minimum of 2 reference letters with contactable references in provision of evaluation research services.<br/> <b>The reference letter should be between 2017 and 2024.</b><br/> <b>For a reference letter to be valid it must be dated and signed.</b><br/>           Less than two reference letters = [0]<br/>           Minimum 2 reference letters = [10]<br/>           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 |
| critierion  | score  |                   |            |       |                   |   |                                      |                  |   |                   |
| Reference letters   | <p>The service provider must submit a minimum of 2 reference letters with contactable references in provision of evaluation research services.<br/> <b>The reference letter should be between 2017 and 2024.</b><br/> <b>For a reference letter to be valid it must be dated and signed.</b><br/>           Less than two reference letters = [0]<br/>           Minimum 2 reference letters = [10]<br/>           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       |  |                   |            |       |                   |   |                                      |                  |   |                   |
| <b>Subtotal for Functionality (maximum) 100%</b>                                |  | <b>100 points</b> |            |       |                   |   |                                      |                  |   |                   |

## 7. TIMELINES OF THE PROJECT

The duration of the project will be forty (40) working days, across the timeline of 3<sup>rd</sup> February 2025 and 28<sup>th</sup> March 2025.

## 8. 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.

## 9. 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.

## 10. COSTING

- 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 a questionnaire provided, please provide a cost indication.

**Quote1:** A database of 520 learners with a questionnaire length of approximately 15-20 minutes.

| ACTIVITY   |                   |              | COST |
|--|-------------------|--------------|------|
| Programming or scripting the questionnaire                           |                   |              |      |
| Training of data capturers   |                   |              |      |
|  | Programme         | Participants |      |
| Conducting telephonic interviews<br>(10 -15 minutes per interview)   | NGO/NPO officials | 520          |      |
| Consolidation, cleaning, validation, and submission of captured data |                   |              |      |
| Fieldwork Report   |                   |              |      |
| Data Analysis  |                   |              |      |
| Evaluation Report  |                   |              |      |
| Total Cost   |                   |              |      |

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

## 11. 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