

Terms of reference (ToRs) for the procurement of services below the EU threshold

Evaluation of Pilot Interventions Implemented through the PYEI	Project number/ cost centre: 20.2210.1-001.00
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0. List of abbreviations

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

1. Background

a. About the project

On behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH implements the project “Support to the Presidential Youth Employment Intervention (S2PYEI)”. The project supports the Presidency of the Republic of South Africa in the coordination and implementation of the PYEI.

b. Context

President Ramaphosa launched the Presidential Youth Employment Intervention (PYEI) in his 2020 State of the Nation Address, as a direct response to the challenge that too many young people are not transitioning from learning to earning. The Presidency provides overall coordination and strategic leadership, while key government departments and agencies lead the implementation of the intervention.

The PYEI is South Africa’s most comprehensive effort yet to address the youth unemployment crisis. The intervention brings together the strengths of numerous government institutions and social partners to deliver more opportunities for young people. It seeks to coordinate, accelerate, and enhance existing programmes. The PYEI also drives innovation and creates pathways to earning for young people at scale. Central to the PYEI's efforts is the establishment of a National Pathway Management Network (NPMN) that guides young people towards opportunities for training, work experience and income. In addition to the NPMN, other PYEI components include: demand-led skilling, the enabling of local ecosystems to facilitate self-employment and enterprise opportunities; and the revitalisation of the National Youth Service. More information on the PYEI can be accessed at www.stateofthenation.gov.za.

The PYEI has implemented a number of 13 pilot projects testing approaches of transitioning young people from learning to earning. GIZ seeks to appoint a service provider to collate learnings and evidence around best practices from these pilot interventions.

2. Tasks to be performed by the contractor

The contractor will conduct and evaluation of the 13 interventions piloted by the PYEI. The evaluation will focus on extracting lessons learned and best practices in implementing youth employment interventions emerging from the pilots.

Learnings from this evaluation will be used to inform future youth employment interventions undertaken by the PYEI. The findings, lessons learned and recommendations should be included in a final evaluation report.

The evaluation should answer the following questions:

- What outcomes were achieved in each pilot intervention?
- What success factors contributed to the achievement of outcomes for each pilot interventions?
- What factors limited the achievement of outcomes for each of the pilot interventions?

- What key lessons around tackling youth unemployment have emerged from the pilot intervention?
- What best practices in implementation of youth employment interventions can be drawn from the findings of the pilot intervention?

Over and above the preliminary evaluation questions provided above, the contractor is expected to suggest additional evaluation questions that may be beneficial in assessing the pilot interventions. All available documentation on each of the pilot interventions will be provided to the contractor during the inception phase of the evaluation. It is expected that a mixed method approach primarily focused on collecting qualitative data in the form of key informant interviews (KIIs) and where necessary focus group discussions will be employed in the implementation of this evaluation. Where applicable, quantitative data collection and analysis can also be used to supplement the qualitative analysis. GIZ will connect the contractor with relevant stakeholders to arrange for interviews and all relevant data collection activities.

The contractor is expected to report the findings of the evaluation in an evaluation report in Microsoft word format. The report shall be a minimum of 40 pages and a maximum of 100 pages (excluding annexes). In addition to the final evaluation report deliverable the contractor is expected to produce the following deliverables:

1. **Inception Report:** During the inception period, the contractor will produce an inception report that will include the evaluation approach and methodology, a preliminary literature and desktop review, a work plan with key timelines and milestones and data collection tools. The inception report should be in Microsoft Word format and should be a minimum of 10 pages and a maximum of 30 pages (excluding annexes)
2. **A PowerPoint presentation** (30 minutes plus Q&A) that provides a summary of the findings of the evaluation for presentation to the PYEI team (including the Presidency, GIZ, and other relevant partners) at the end of the evaluation.
3. **A learning brief** that distils the findings of the evaluation into actionable learnings that can be disseminated to the wider ecosystem. The learning brief should be a minimum of 2 pages and a maximum of 7 pages (excluding annexes).
4. **A validation workshop** (virtual) with relevant partners. The bidder should calculate one day for the workshop.

GIZ and PMO will have 1-hour meetings every other week to check-in on progress and align on the next steps. The contractor will obtain approval from GIZ for any products used in the course of the implementation of the contract, incl. data collection instruments.

For each deliverable, one feedback loop is foreseen. The contractor will receive feedback to the draft deliverables within 5 working days. Feedback will be provided by GIZ as well as the PMO.

Partial works	Timeframe	Criteria for acceptance
Inception Report	4 weeks after start of contract	All comments of GIZ and PMO to the draft inception report have been addressed
Final Evaluation Report	12 weeks after start of contract	All comments of GIZ and PMO to the draft evaluation report have been addressed
Final Evaluation Presentation Deck	12 weeks after start of contract	All comments of GIZ and PMO to the draft deck have been addressed
Presentation of results	12 weeks after start of contract	All comments of GIZ and PMO to the draft evaluation report have been addressed
Validation workshop	tbd	
Learning Brief	14 weeks after start of contract	All comments of GIZ and PMO to the draft evaluation report have been addressed

Period of assignment: from 01 October 2024 until 28 February 2025.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept).

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present and explain its approach to **steering** the measures with the project partners (1.3.1)-

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail (1.6.1)

The tenderer is required to draw up a **personnel assignment plan (1.6.2)** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on

assignment dates (duration and expert months) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

Further requirements (1.7)

None.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Team leader

Tasks of the team leader

- Overall responsibility for the work
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): Advanced university degree (Master) in Monitoring Evaluation and Learning, Economics, Development Economics or another relevant field
- Language (2.1.2): C2-level language proficiency in English
- General professional experience (2.1.3): 10 years of professional experience in Monitoring, Evaluation and Learning (MEL), one concrete example of conducting theory-based participatory evaluations
- Specific professional experience (2.1.4): 3 concrete examples of managing or conducting evaluations in the context of (youth) employment promotion, incl. title of the evaluation, role in the evaluation, and commissioning party
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company
- Regional experience (2.1.6): 5 years of experience in South Africa
- Development cooperation (DC) experience (2.1.7): None
- Other (2.1.8): None

Key expert 1

Tasks of key expert 1

- Providing technical expertise of the evaluation

Qualifications of key expert 1

- Education/training (2.2.1): Postgraduate qualification in Economics, Development Economics, Monitoring, Evaluation and Learning or another relevant field

- Language (2.2.2): C2-level language in English.
- General professional experience (2.2.3): 5 years of professional experience in MEL
- Specific professional experience (2.2.4): 3 concrete examples of conducting evaluations in the context of (youth) employment promotion, incl. title of the evaluation, role in the evaluation, and commissioning party
- Regional experience (2.2.5): 5 years of experience working in South Africa
- Development Cooperation (DC) experience (2.2.6): None
- Other (2.2.7): None

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Team skills
- Initiative
- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

Short-term expert pool with minimum 1, maximum 3 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

- Data collection
- Analysis
- Report writing

Qualifications of the short-term expert pool

- Education/training (2.6.1): All experts with postgraduate qualification in Economics, MEL, or another relevant field
- Language (2.6.2): All experts with C2-level language proficiency in English
- General professional experience (2.6.3): All experts with 2 years of professional experience MEL
- Specific professional experience (2.6.4): All experts with at least 1 year of experience in the context of employment promotion
- Regional experience (2.6.5): All experts with 2 years of experience in South Africa
- Development cooperation (DC) experience (2.6.6): None
- Other (2.6.7): None

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

5. Costing requirements

The following basic calculations for the contract for works are a reference value based on the acceptance criteria for each partial work/milestone specified in Chapter 2 (Tasks to be performed by the contractor).

Since the contract to be concluded is a contract for works, we would ask you to offer your services at a lump sum price.

In addition, the assessment of the financial bid is also based on the underlying daily rate. Please also provide the underlying daily rate. A breakdown of days is not required.

Partial works	Estimated expert days for orientation
Inception Report	10
Draft Evaluation Report	60
Final Evaluation Report	5
Validation Workshop	2
Final Evaluation Presentation	4
Learning brief	4

6. Inputs of GIZ or other actors

GIZ and other actors are expected to make the following available:

- Documentation on the pilot projects to be evaluated
- Contacts for the implementing partners that conducted the pilots (for the purpose of scheduling interviews)

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 3 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English.

As the contract to be concluded is a contract for works, please offer a fixed lump sum price that covers all relevant costs (fees etc.). The price bid will be evaluated on the basis of the specified lump sum price. In addition, please also provide the underlying daily rate. A breakdown of days is not required.

8. Data protection

The contractor may collect or be entrusted with documentation about the pilot projects, including project concepts, partners' full names, and email addresses, to fulfil the contract. The contractor is obliged to protect this data under the standards of South Africa's Protection of Personal Information (POPI) Act and the European Union's General Data Protection Regulation (GDPR), in particular Articles 44-50. The contractor shall act as an independent data controller for the data that he processes in connection with the contract and shall comply with the applicable obligations under this data protection legislation.

9. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **16th August 2024** all documents must be in PDF.
- Submission to any other email address may invalidate your bid.
- Please do not mention any price for this measure on your cover letter/Technical proposal.
- Please submit your tax clearance certificate with the bidding documents.
- Please submit your price proposal in **ZAR**.
- Our General Terms of Conditions (attached) shall not be changed/amended should you be the winner of this tender. These General Terms and Conditions will form part of the contract should you be awarded this contract. By submitting your proposal, we will conclude that you have read and accepted these terms and conditions.
- Participating more than once in same tender is not allowed and it will lead to your proposal as well as that of the company where you appear more than once being disqualified. The responsibility rests with the companies to ensure that their partners/experts are not bidding/participating more than once in same tender.
- **Bidders are not allowed to communicate directly with any other person regarding this bid other than the procurement official/s. Failure to comply with this requirement may lead to your bid being disqualified.**
- Bidders must strictly avoid conflicts with other assignments or their own interests. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this EOI and tender process, if they:
 - a) are or have been associated in the past, with a firm or any of its affiliates which have been engaged by GIZ or the Interim Supply Chain Management Council to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the services in this selection process;
 - b) were involved in the preparation and/or design of the programme/project related to the services requested under this EOI and tender;

- c) are serving or have been serving in the past three months in the structures of the Interim Supply Chain Management; or
- d) are found to be in conflict for any other reason, as may be established by, or at the discretion of GIZ.

Scientific data

In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to GIZ, and seek GIZ's confirmation on whether or not such a conflict exists.

- Similarly, the Bidders must disclose in their proposal their knowledge of the following:
 - a) if the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of GIZ staff involved in the procurement functions and/or the Interim SCM Council or any Implementing partner receiving services under this EOI or tender; and
 - b) all other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.
- **Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.**

Bids sent via Dropbox and WeTransfer will not be accepted