



# Funda Uphumelele National Reading Study

## Data Collection Service Provider Terms of Reference

April 2024

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### 1. Introduction

The Department of Basic Education (DBE) is leading the Funda Uphumelele Reading Study (FURS) which will be the first study to develop language-appropriate assessments aligned to the newly developed reading benchmarks. The assessment will measure core skills for reading in African languages with appropriate word structures, complexity and meaning for early grades. In addition, teacher guides with language-specific strategies addressing gaps (where learners do not reach the reading benchmarks) will be developed. The results of the FURS learnings and resources will be used to further strengthen the curriculum in various ways.

A consortium of donors is partnering with the DBE to support this project. In partnership with the consortium, the Department seeks to contract a data collection service provider to collect primary school learner reading data in 11 languages across 6 provinces over three pilots. The service provider will also provide training on assessment administration and report on the findings.

**NOTE:** *Whilst the Zenex Foundation will facilitate the contracting, the appointed service provider will report to the Technical Working Group based the Department of Basic Education (DBE) and the project's Steering Committee.*

### 2. Background

Through participation in the Progress in International Reading and Literacy Study (PIRLS) that assesses reading comprehension at the Grade 4 level, South Africa has been able to track the percentage of Grade 4 learners who are attaining grade-appropriate reading comprehension. South Africa's low reading comprehension levels measured in Grade 4 as reflected in PIRLS indicates that the setbacks in early literacy development emerge in the Foundation Phase (Grades R-3). This means a high number of learners have problems with skills that precede reading comprehension. These are foundational and technical aspects of reading that relate to knowledge of the written code. There are currently no national assessments in South Africa measuring these early technical skills.

### 3. Programme Description and Outcomes

The study will be split into 5 phases. The Data Collection Service Provider will be responsible for providing support to the DBE in several phases of the project.

#### **PHASE 1: Development**

Phase 1 will be around the development of instruments. Approximately 12 instruments per language will be developed. These instruments will be developed by two linguists and/or Foundation Phase specialists per language through an iterative. This process will be coordinated and overseen by the department's Research Coordination, Monitoring, and Evaluation (RCME) directorate and the Technical Working Group (TWG).



### PHASE 2: Piloting

The study will consist of three pilots to test the appropriateness of the new instruments. Data collection for the **pilots** will be limited to **six provinces**, however all **11 languages** will be reached.

### PHASE 3: Analysis and Report Writing

Analysis and report writing of all the data will commence in Phase 2 as the pilots begin and continue through Phase 3. The data analysis will be led internally by RCME, with additional quantitative analysis capacity added if necessary.

### PHASE 4: Curriculum and Systems Strengthening

Specific curriculum-strengthening efforts and deliverables are detailed below.

- I. EGRA Update and Training
- II. Strengthening of the CAPS Curriculum
- III. Whole School Evaluation Programme
- IV. Remedial Support for Early Skills
- V. Mother Tongue based Bilingual Education (MTbBE) Implementation

### PHASE 5: Dissemination

A public dissemination to share the findings from the research as well as the curriculum strengthening process will be held with all stakeholders, including affected directorates within the DBE, provinces, NGOs, and donors.

## 4. Timeline

ACTIVITIES	Q4 23-24			Q1 24-25			Q2 24-25			Q3 24-25			Q4 24-25			Q1 25-26		
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J
Appoint Data Collection SP			Activity	Activity														
FUNS Instrument Development				Activity	Activity													
FUNS Pilot 1 and Revisions					Activity	Activity												
FUNS Pilot 2 and Revisions						Activity	Activity											
FUNS Pilot 3 and Revisions							Activity											
Instrument Finalisation								Activity										
Fieldwork Training									Activity									
Data Collection										Activity	Activity							
Analysis and Report Writing				Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity	Activity
Launch and Dissemination																	Activity	Activity

**KEY:** ■ Activity  No Activity

## 5. Scope of Work

This work is an initiative of the Department of Basic Education (DBE) managed through the Research Coordination, Monitoring, and Evaluation (RCME) directorate with whom the Data Collection Service



Provider will be in direct contact. The specific undertaking by the appointed service provider will be to:

- i. Electronically version data collection instruments provided onto Tangerine, SurveyCTO or similar applications, to enable remote and offline large-scale pilot data collection via tablets.
- ii. Conduct and manage data collection for all three pilots. The service provider will recruit at least 5 field officers for each of the 11 languages that will be surveyed. The following skills will be assessed in all data collection activities. Surveying of principals and teachers will be conducted in the third pilot.

Table 1: Skills to be assessed per grade and language

Tasks	Grade 1	Grade 2	Grade 3	Grade 4	Grade 6
<b>One-on-one Oral Assessments:</b>					
Letter Sound Knowledge Task (HL)	✓	✓			
Morphological Awareness Task (HL)	✓	✓	✓	✓	
Word Reading Task (HL)	✓	✓	✓		
Word Reading Task (EFAL)		✓			
Oral Reading Fluency Task (HL)	✓	✓	✓	✓	✓
Oral Reading Fluency Task (EFAL)			✓	✓	✓
<b>Written Assessments:</b>					
Comprehension Task (HL)			✓	✓	✓
Comprehension Task (EFAL)				✓	✓
Syntax Task (HL)			✓	✓	
Semantics Task (HL)				✓	✓
Teacher Interview	✓	✓	✓	✓	✓
Principal Interview			✓		

### 5.1. Pilot Specifications

The appointed service provider will be responsible for conducting the piloting of the instruments between **May and July 2024** and provide constructive feedback as to how well the questions worked. This should be done through item-level quantitative data analysis of the assessments.

The learner assessments will be in all the Languages of Learning, Teaching and Assessment (LoLTAs) at the home language level as well as English at the First Additional Language level. The field officers recruited for each language should be home language fluent speakers in the respective language they are expected to conduct assessments in as well as fluent speakers of English.

The appointed service provider will make sure that field officers have been properly prepared by setting aside **at least 5 days** for training, including a simulation day at a school for the first two pilots.

The pilots will be conducted in **5 schools** in **six provinces**, however, all **11 Home Languages and English FAL** (in schools that do not offer English HL) will be assessed. For each grade (1-4 and 6) 15 learners will be randomly sampled. Each pilot's results will determine which of the tasks will be conducted in the subsequent pilot. Below is the table which details the provinces, number of schools and learners for each language for each of the three pilots.



Table 2: Distribution of languages assessed across provinces for pilots.

	Free State	Gauteng	Limpopo	Mpumalanga	North West	Eastern Cape	Total Schools	Total Learners
Afrikaans						5	5	375
English HL		5					5	375
IsiNdebele				5			5	375
IsiXhosa						5	5	375
Isizulu		2		3			5	375
Sepedi			5				5	375
Sesotho	5						5	375
Setswana					5		5	375
Siswati				5			5	375
Tshivenda			5				5	375
Xitsonga			5				5	375
<b>Total</b>	<b>5</b>	<b>7</b>	<b>15</b>	<b>13</b>	<b>5</b>	<b>10</b>	<b>55</b>	<b>4125</b>

## 5.2. Expected Data Collection Procedure

The estimated duration of data collection for each school visit is likely to be between 4 – 6 hours. This means that teams will need to arrive at the school by 7am when the school opens for the day in order to make all preparations with the principal before starting off the data collection. Late arrivals will not be accepted as it will jeopardise the completion of the data collection at a school.

All the field officers will have to handle the related timing of tasks and complete the required school-teacher-learner linkage and other administration forms. In addition, field officers in teams are jointly responsible for scheduling the programme for the day.

During the pilot data collection, it is expected that each school will be visited for one day only. A mop-up day per team should be included in the fieldwork schedule. For this to be feasible, it is advised that each team has a minimum of 5 field officers. The Service Provider will not be allowed to change the period stipulated or change the number of teams in the field, except with the explicit consent of, or at the request of, the TWG.

## 5.3. Data Collection Instrument Specifications

The appointed service provider will be responsible for electronically versioning data collection instruments (also referred to as the learner assessments) as well as teacher and principal questionnaires onto the Tangerine, SurveyCTO, or similar application, to enable remote data collection via Android tablets.

The main purpose of the assessments is to determine whether learners are reaching the reading benchmarks developed by the DBE for their grade. Therefore, learner assessments will be designed and approved by the TWG, but it is expected that the Service Provider will work closely with the TWG and undertake responsibility for training field officers to administer these learner assessments.

The Grade 1, 2, 3, 4, and 6 assessments will include components that will be assessed orally by the field officer in a one-on-one manner using an electronic tablet via the chosen app. Additionally, the same Grade 3, 4 and 6 learners will complete individual written assessments in a group test condition setup.



The service provider will be expected to upload the learner assessments onto the tablet and provide evidence of quality assurance in the uploading process. As the assessments will be electronic, data capturing therefore happens directly upon administration of the questionnaire. The Service Provider will, however, be responsible for printing and compiling learner assessment charts/prompts for each data collector. The learner assessment charts/prompts must be printed in colour.

## 6. Service Provider Responsibilities

### 6.1. Planning

The service provider will be expected to:

- produce a clear and binding work schedule that includes a proposed schedule of visits;
- deliver a detailed data management plan describing standardised data collection, capturing, storing, coding, and labelling procedures;
- deliver a detailed data quality assurance plan describing the procedures which will be established to ensure high data quality both during data collection and data capturing; and
- recruit, select, and take full administrative responsibility for all field officers, supervisors and trainees needed to complete all aspects of the data collection.

### 6.2. Equipment

It will be the responsibility of Service Provider to provide tablets and have an adequate number of extra tablets on hand at training and for use as back-up should devices malfunction or be damaged during data collection. The specifications on the model and make of the tablets, as well as the software that will be used for data capturing, should be communicated to the TWG.

### 6.3. Training

The service provider, in consultation with the TWG, will be responsible for conducting a compulsory in-person training workshop for a minimum of five days for the first pilot for all field officers and supervisors. The trainings should be conducted at the Department of Basic Education. Proposed dates should be **at most** a week ahead of data collection. All administrative matters should be scheduled separately.

To ensure that every individual data collector is able to adhere to the required data collection standards, the trainings should include:

- extensive daily opportunities to practice
- daily Inter-Rater Reliability assessments
- simulations at a school.

Two language specialists/linguists per language contracted by the TWG will assist with the training of the administration of the learner assessments. The appointed Service Provider is expected to work closely with said specialists and additionally is expected to provide co-trainers.

Training will be conducted mostly in English; however, the different language components of the learner assessments will need to be facilitated by the respective language specialists. The final screening of the field officers will take place at the end of training to allow **only those who have mastered the data collection or administration procedures to go to the field**. Therefore, the service



provider must recruit additional field officers to be trained per language. Field officers must be issued with and wear name tags to identify and associate them with this evaluation.

#### 6.4. Fieldwork

It is expected that the Service Provider will:

- In consultation with TWG, compile a comprehensive field officer administration manual which will form the basis of the field officer training and the subsequent data collection.
- Provide the final planned fieldwork schedule (data collection visits to schools) in writing to the TWG. A pre-finalised fieldwork schedule should be submitted **ahead of each pilot** and again by the end of the pilot should updates be made. The ideal procedure for this is to design the schedule upfront; schools should then be contacted, and only if there is a problem with the suggested date for a particular school can the schedule then be rearranged to make sure all schools are tested. It is expected that the schedule contains the necessary information on the school regarding the date of visit, confirmation that accurate directions to the school have been obtained and the field officers allocated for the visit.
- Provide the TWG with the names and contact details of all the field officers and fieldwork managers to be working in the pilots, including indications of their experience and language proficiency. A provisional list should be submitted **a week after inception** and the final list by the end of Pilot 3.
- Obtain and verify the GPS location and directions for locating the schools using the DBE data with GPS coordinates and school contact details of the schools provided to the Service Provider.
- Arrange all travel, logistics and accommodation for both the training and data collection of the field officers. Shared transport between different teams of field officers to schools **is not allowed** as this would lead to field officers arriving late and not administering the instruments at the required quality. Each team of field officers would, therefore, need to have access to their own car.
- To ensure that all field officers administer the tests at the correct school, field officers should request each school to apply its official school stamp to one of the project documents.
- Ensure that the data collected at schools by field officers is accurate and complete.

#### 6.5. Distribution

It is expected that the appointed Service Provider will:

- Print, pack and distribute all relevant materials to field officers ahead of their school visits. It is expected that each field officer should have a copy of the learner assessment, charts, forms and training manual. These documents should either be laminated or in a flip file in order to ensure that they will remain neat throughout the data collection period. The field officers should also have writing tools.
- Ensure that each tablet has enough data and battery capacity for each school visit.
- If the tablets intend to be used for navigation or communication purposes, the Service Provider will have to top-up the data bundles and charging equipment accordingly.
- Properly supervise, monitor and support field officers throughout the fieldwork by means of regular and sufficient presence and guidance of experienced fieldwork supervisors.
- Communicate daily with the TWG during fieldwork to discuss any changes to the schedule, any emergencies or actions needed to be taken. The TWG must approve any changes that will



result in a reduced number of schools visited or learners assessed. Should this not be the case the TWG may withhold payment.

## **6.6. Data Management**

It is expected that the Service Provider will:

- Establish procedures to ensure that all the data collected can be linked.
- Provide the TWG with the final raw data, uncleaned, in either CSV, Excel or Stata format.
- Complete a fieldwork report that must contain the following details:
  - List of schools visited;
  - Time of arrival at and departure from each school site;
  - The number of instruments completed at each site per category;
  - Reasons for not completing the required totals; and
  - Specific issues that arose at each school site and how each issue was dealt with.

The confidentiality and security of all procedures, forms, questionnaires and test booklets with their test items have to be safeguarded at all times.

## **7. Project Management and Governance**

The Funda Uphumelele Research Study (FURS) is led by the DBE, working in collaboration with a range of social partners and funders. The three committees that will be formed as the governance and oversight structures for the project are: the Technical Working Group (TWG), Steering Committee, and Funders Group. The appointed Service Provider will be in direct communication with and report to the TWG. Below are the responsibilities of the TWG towards the Service Provider.

### **7.1. Technical Working Group**

The TWG will be responsible for:

- In collaboration with the appointed test developer, providing the final test instruments and questionnaires in a PDF/Microsoft Word format ready for upload to the chosen application.
- Providing the names and EMIS numbers of the participating schools to the Service Provider.
- Obtaining permissions and support from schools and districts beforehand about the study. Schools will be sent official notification from the DBE about data collection including communication of who the Service Provider will be.
- Should the Service Provider require them, the TWG will loan the Service Provider top-up tablets. The electronic tablets will remain the property of the TWG and need to be returned, intact, upon completion of the data collection.
- In collaboration with the Service Provider, finalising the electronic test instrument.
- Supporting the training of field officers in conducting the assessments and working with the fieldwork instrument tools by training their trainers and provider. The Service Provider will be expected to lead the training alongside the appointed test development specialist.
- Monitoring the data collection in order to establish whether the methodology has been adhered to in its finest detail and ensure that the data quality is of an acceptable standard.

## **8. Key Personnel**

The Key Personnel specified below are essential to the work required from the appointed Service Provider. It is important that no one person fulfils more than one role. A profile of each personnel



member should be sent along with the proposal. In the instance where there is no incumbent in the role, Terms of Reference for the role must be provided.

### 8.1. Project Manager

This person will be responsible for holistic oversight of the project including the administration, logistics, and finances. The project manager will work closely with the field managers in overseeing fieldwork-related activities including recruitment and training. They will be the primary liaison person between the Service Provider and the TWG. They will compile the reports required from the Service Provider and ensure quality assurance. This person must have at least 5 years' experience in project management in large scale projects.

### 8.2. Senior Data Manager

The data manager will translate all instruments into the chosen data collection software and should be able to train the end users of the software. The data manager will develop and execute data quality management processes that enable automated data error detection and resolution in real time. They will also be responsible for monitoring data quality and cleaning data in preparation for analysis. The data manager will also be responsible for analysing the trainees' Inter-Rater Reliability assessments and simulations during all trainings. The data manager should have at least 5 years' experience working with large-scale data, ideally in education. They will work closely with the Senior Quantitative Researcher.

### 8.3. Field Managers

These will be the point people for all fieldwork-related matters and for managing the teams in the field. They will visit at least one site a day in the field to monitor and assist with any troubles that arise. These individuals will be responsible for managing the teams in the field. Each manager must oversee **a maximum of three teams**. They will lead the field teams to complete projects within allotted timelines as well as budget and problem solve any troubles that arise that the field teams bring to their attention. They will visit each team they supervise at least once during the pilot week to monitor and assist with any troubles that arise. They must have at least 3 years' experience working in large scale projects. Field managers must be fluent in at least one of the languages of the teams they are overseeing and in tablet usage as well as basic troubleshooting.

### 8.4. Field Officers

Selected field officers will be expected to be able to conduct **all** the assessments required for all grades. It is preferred that they be available **throughout** the piloting period. The appointed field officers must be fluent in speaking, reading, and writing in English and the language that they are selected for. Field officers must also be proficient in tablet usage as all data collection will be done through an early grade reading tablet-based application. For the main data collection, the Service Provider must train an **additional five** field officers per language who will be on standby for replacement or top up if necessary.

## 9. Deliverables and Payment Schedule

All deliverables submitted will be subject to scrutiny by the TWG and approval will only be granted if the deliverables are of the required quality. Thus, finalisation of deliverables may entail several revisions based on feedback provided. Feedback on the submitted deliverables will be completed





## basic education

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Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA

within 10 days after the receipt of deliverables, except for the final report. Feedback/approval for these will be given 21 days after receipt. The feedback may be the approval of deliverables or a request for revision. Zenex Foundation will make payments within 14 days of receipt of the invoices based on approval of the deliverables by the TWG. The table below provides a summary of the phases and payment tranches.



**9.1. Deliverables and Payment Schedule**

No.	DELIVERABLES	DUE	PAYMENT %	EARLIEST PAYMENT DATE
<b>INCEPTION</b>				
1.	Inception meeting	April 2024		
2.	Inception report	Submit 7 days after inception meeting	<b>35%</b>	14 days after approval
<b>PILOT 1</b>				
3.	Pilot 1 instruments loaded on application and tested	23 May 2024		
4.	Training Pilot 1 Field Officers	27-31 May 2024		
5.	Pre-finalised field officer list and schedule	03 June 2024		
6.	Pilot 1 in 50 schools	03 June – 10 June 2024		
7.	Clean raw data from Pilot 1 in 50 schools and final field officer list and schedule	17 June 2024	<b>15%</b>	01 July 2024
<b>PILOT 2</b>				
8.	Revised instruments on application and tested for Pilot 2	04 July 2024		
9.	Training Pilot 2 field officers	15-22 July 2024		
10.	Pre-finalised field officer list and schedule	22 July 2024		
11.	Pilot 2 in 50 schools	22-29 July 2024		
12.	Clean raw data from Pilot 2 in 50 schools and final field officer list and schedule	29 July 2024	<b>15%</b>	12 August 2024
<b>PILOT 3</b>				
13.	Revised instruments on application and tested for Pilot 3	22 August 2024		
14.	Training Pilot 3 field officers	26-28 August 2024		
15.	Pre-finalised field officer list and schedule	29 August 2024		
16.	Pilot 3 in 50 schools	29 August-06 September 2024		
17.	Clean raw data from Pilot 3 in 50 schools and final field officer list and schedule	09 September 2024	<b>15%</b>	23 September 2024
18.	Preliminary Pilot fieldwork report	13 September 2024	<b>10%</b>	27 September 2024
19.	Final Pilot fieldwork report	23 September 2024	<b>10%</b>	14 October 2024

These are provisional dates to be finalised and communicated closer to each activity.



## 9.2. Contracting

The implementation plan, deliverables as well as the nature timing of reports and other required data/information will be finalised before the signing of the contract. The contract will be subject to performance reviews by the TWG and Zenex Foundation, who may discontinue the contract at any time based on substandard performance or non-delivery. The Service Provider commits to abiding by all Zenex Foundation policies and regulations. Zenex Foundation will make payments within 14 days of receipt of the invoices based on approved deliverables.

## 9.3. Price Cap

All activities associated with the implementation should be budgeted **for no more than R 3 500 000 inclusive of VAT**. Applicant budgets that are submitted must clearly outline VAT charges where they apply. The selected quotation amount specified at application will be the contract ceiling price and cannot be changed upon appointment.

The contract will be subject to performance reviews by Zenex Foundation and the TWG in its sole discretion who may discontinue the contract at any time based on substandard performance or non-delivery. The Service Provider commits to abiding by all Zenex Foundation policies and regulations.

## 9.4. Intellectual Property Data and Copyright

The contract with the service provider will be subject to and include Zenex Foundation-specific principles, policies, regulations, definitions and contractual terms specific to the Zenex Foundation Award. Without limiting the generality of the foregoing:

- All rights, title and interest to intellectual property and works, trademarks, copyright, patents, patent applications, data, and property, including the application to be developed in terms of this ToR, will vest in the Department of Basic Education (DBE). The department will have sole and irrevocable right to use, disclose, reproduce, prepare derivative works, distribute copies to the public, and perform publicly and display publicly, in any manner and for any purpose, and exercise the right to extend the use of these to others at its discretion.
- Property financed under this ToR by the DBE and/or Zenex Foundation and affiliated donors will inter alia include the following:
  - Equipment, supplies, real property, and intangible property;
    - Equipment means tangible nonexpendable personal property (including information technology systems);
    - Intangible property includes, but is not limited to, intellectual property, such as trademarks, copyrights, patent and patent applications, and debt instruments, such as bonds, mortgages, leases or other agreements between a lender and a borrower;
    - Intellectual works include all works that document the implementation, evaluation and results of international development assistance activities developed or acquired under the ToR, which may include program and communication materials, evaluations and assessments, information products, research and technical reports, progress and performance reports required under the Award and this ToR and other reports, whether published or not;
    - Data means recorded information, regardless of the form or the media on which it may be recorded, including technical data and computer software and intellectual works.
- The appointed service provider will assign to the DBE its copyright to all data, instruments, documents, and reports emanating out of this study.



- Permission may be sought by the service provider to use any data from the research. Such permission will not be unreasonably withheld provided the data will make a positive contribution to the sector and all reports and presentations emanating from such, will acknowledge the DBE and funding partners' role.
- The results of the findings will be shared with the broader sector and other participating stakeholders such as schools, other funding agencies, and key identified role players in education including the DBE.

## **10. Application Process**

Below is the application process that will be followed. Service Providers who do not comply with all the requirements listed will not be considered.

### **10.1. Service Provider Competencies**

Only service providers with the following competencies and capacity should consider applying. Applications from consortiums or joint ventures with these competencies and capacity are also eligible.

- Experience and expertise in quantitative and qualitative data collection using various instruments in multiple primary schools while providing high-quality data management and quality assurance. Preference will be given to providers able to demonstrate capacity and experience with data collection in rural areas of South Africa.
- Expertise in the development of school level/SMT and/or parental background questionnaires.
- Expertise in the development of the necessary online data collection tools to support timeous and accurate data for analysis.
- Experience and expertise in deploying professionally trained field officers/enumerators to conduct assessments with children.
- Experience and expertise in deploying professionally trained field officers/enumerators to conduct structured classroom observations, school questionnaires and teacher/SMT interviews in the language requirements of the study.
- Internal capacity to conduct full scope of the study.
- Willingness and availability to work closely with the Technical Working Group to ensure seamless data collection.

### **10.2. Proposal Package**

Only proposals that have the following will be considered:

1. A response proposal detailing a clear work schedule and risk management plan.
2. A profile/CVs of key personnel outlined in section 8.
3. A project management plan and fieldwork protocol including the following:
  - i. field officer recruitment plan;
  - ii. data management plan; and
  - iii. data quality assurance plan for both data collection and data capture.
4. A detailed budget with clear outline of VAT charges where applicable.
5. Evidence of relevant experience in large scale data collection in education.
6. Sample of similar work previously done – this could include a methodology section or tools previously developed.
7. Evidence and specifications of the tablets and software that will be used.



8. Specific experience in assessing schoolgoing learners aged 7 – 10 is highly desirable.
9. Please include three contactable references from three different projects.
10. An original Tax Clearance Certificate
11. A BBBEE certificate (if applicable)
12. Company Registration Documents
13. 2 Years of Audited Annual Financial Statements for the 2021/22 and 2022/23 financial years.
14. If applying as a Partnership or Joint Venture the following documents must be attached/addressed:
  - i. The agreement signed by nominated members of both/all partnership or joint venture partners;
  - ii. State the leading company; and
  - iii. Submission of all applicants' (within the consortium/joint venture) original valid tax clearance certificate.

### 10.3. Application Timeline

Process	Dates
Non-compulsory virtual briefing <a href="#">Click here</a> for meeting link	12 April 2024 12:00
Submission Closing Date	26 April 2024
Shortlisted candidate interviews/presentation to the evaluation team	Week of 06 May 2024
Preliminary appointment of service provider	Week of 13 May 2024
Inception meeting	
Inception report for submission to TWG and finalisation of contracting	Week of 20 May 2024

These are provisional dates to be finalised and communicated closer to each activity.

### 10.4. Evaluation Weighting Criteria

Criteria	Weight
<b>1. Experience in large scale national/provincial data collection</b> <ol style="list-style-type: none"> <li>1.1. A minimum of 5 years' experience in executing large-scale data collection.</li> <li>1.2. Specific experience <b>in the education sector</b> and especially in assessing school-going learners aged 7 – 10.</li> <li>1.3. Specific experience in collecting data using electronic devices/online data collection tools.</li> <li>1.4. Three recent (no more than 3 years) and relevant reference letters and details of the fieldwork undertaken for each of them.</li> <li>1.5. Sample of similar work done – this could include a methodology section or tools previously developed.</li> </ol>	35
<b>2. Industry Standard Methodology:</b> <ol style="list-style-type: none"> <li>2.1. Bid response proposal demonstrating understanding of the project and plans to successfully complete the project within the prescribed timeframe.</li> <li>2.2. A project management plan and fieldwork protocol including a data management plan and data quality assurance plan for both data collection and data capture.</li> <li>2.3. <b>All required documents</b> for bid application submitted.</li> </ol>	20



## basic education

Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA

<b>3. Effective Operational Capacity:</b> 3.1. Organisational structure of team to be on the project 3.2. List and profiles/CVs of key personnel to work on the project including number of black persons (as per B-BBEE definition) who will be on the project. 3.3. Recruitment strategy and Terms of Reference (ToR) for field officers. Include field team make-up (head count for each language). If a full list of field officers by name is available, it may be included. 3.4. Proposed plan for field teams' provincial and language allocations. 3.5. B-BBEE rating	15
<b>4. Competitive Financial Capability:</b> 4.1. Detailed <b>budget, specifying price</b> within the price cap of R 3 500 000 with VAT where applicable. 4.2. Audited financial statements for the 2021/22 and 2022/23 financial years	30
<b>TOTAL</b>	<b>100</b>

### 10.5. Submission

The deadline for submissions is **26 April 2024**. Complete applications must be emailed to Ms Lesang Sebaeng (Sebaeng.L@dbe.gov.za), ccing Dr Nompumelelo Mohohlwane (Mohohlwane.N@dbe.gov.za).

Successful applicants will receive confirmation of shortlisting **one week** after the submission deadline. If you have not received an email or telephonic confirmation in that time, please consider your application unsuccessful.