REQUEST FOR EXPRESSION OF INTEREST EOI

HWSETA invites proposals from competent and independent service providers with experience in occupational qualification and curriculum assessment, evaluation and mixed-methods research in the health and welfare sector.

EOI particulars	Submission details
Title of the EOI	Assessment of the Sector Relevance of HWSETA Developed Occupational Qualifications
Date of this EOI	03/11/2026
EOI reference number	HWSETA-26/27 EvalResearch-0009
Date and closing date	Expressions of interest must be emailed no later than 18/11/2026, 23.59] with subject line "[HWSETA-26/27 EvalResearch-0009]"
Service category	Evaluation
Attention and submission address	Expressions of interest must be received no later than **18/11/2026** to: **research@hwseta.org.za** (with attachments not exceeding 100-150 MB). Queries may be directed to research@hwseta.org.za no later than [13/11/2026].

Interested service providers must supply,

A technical proposal that responds to the provided terms of reference, including,

- Understanding of the assignment and context
- Evaluation approach, proposed methodology, data management and protection plan, as well as data analytic approach
- Composition, experience and qualification of the evaluation team
- Workplan and timelines
- Examples of previous recent and relevant evaluations
- Proven work experience in conducting similar evaluations

A financial proposal or costing including a detailed budget to implement the project.

TERMS OF REFERENCE

ASSESSMENT OF THE SECTOR RELEVANCE OF HWSETA DEVELOPED OCCUPATIONAL QUALIFICATIONS

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1. BACKGROUND AND CONTEXT

The Health and Welfare Sector Education and Training Authority (HWSETA) supports a skilled workforce for South Africa's health and social development sectors. Its mandate derives from the Skills Development Act 97 of 1998, as amended. The National Skills Development Plan (NSDP) 2030, promulgated in March 2019, the National Development Plan 2030 and the White Paper for Post-School Education and Training (2013) provide the policy context for identifying sector skills needs and linking learning interventions to occupational demand, workplace requirements and national development priorities.

Occupational qualification development operates within the National Qualifications Framework Act 67 of 2008 and the Occupational Qualifications Sub-Framework (OQSF) Policy, published through Government Notice 1463 in Government Gazette 45401 of 29 October 2021. The Quality Council for Trades and Occupations (QCTO) manages the OQSF and oversees occupational qualification development and quality assurance, while the South African Qualifications Authority (SAQA) registers qualifications on the National Qualifications Framework following recommendation by the QCTO. Occupational qualifications integrate knowledge, practical skills and workplace experience to prepare learners for defined occupational roles, with assessment requirements intended to establish occupational competence.

The transition from historically registered, or legacy, qualifications to occupational qualifications forms an important context for this assessment. The original transitional arrangements established 30 June 2023 as the registration end date for affected pre-2009 qualifications, 30 June 2024 as the last date for new learner enrolments and 30 June 2027 as the last date for learner achievement. HWSETA also stopped accepting applications for provider accreditation against historically registered qualifications from 30 June 2023. These milestones represent different stages of the transition and must be distinguished from one another.

Subsequent arrangements are set out in Government Notice 4920, Government Gazette 50742 of 3 June 2024, and Government Notice 7610, Government Gazette 54858 of 17 June 2026. The 2026 directive provides differentiated extensions for identified qualifications, trades and regulatory unit standards, with dates published by SAQA; there is no blanket extension for all legacy qualifications.

HWSETA established its Qualification Development and Maintenance subdivision in October 2013 and supports qualification development, maintenance and sector engagement. The qualifications developed include health promotion, home-based care, child and youth care, social auxiliary work, social counselling and occupational health and safety. The 2024 and 2026 directives confirm SETA accountability for occupational qualification development and replacement; the 2026 directive also addresses implementation and quarterly transition reporting.

Development and review require structured consultation under applicable QCTO policies and procedures. Assess evidence of occupational need; participation by relevant employers, practitioners, worker representatives, providers and statutory or professional bodies; development or validation of occupational profiles, curriculum and assessment specifications; and approval and registration. Records must show how stakeholder inputs influenced design and how differing needs were resolved. Assess historical development against the procedures and delegations applicable at the time, and current suitability against present sector requirements.

2. PURPOSE AND OBJECTIVES OF THE ASSESSMENT

The commissioning rationale is reflected in HWSETA's Monitoring and Evaluation Programme for 2026–2027, which identifies an assessment of HWSETA-developed occupational qualifications under strategic outcome indicator 6-29: Percentage of occupational qualifications developed by the HWSETA found to be relevant by the sector to occupations on high demand by the end of the strategic period. The indicator links to output indicator 29 and requires a clear, evidence-based basis for judging the relevance of each qualification.

The overall purpose is to assess the extent to which HWSETA-developed occupational qualifications respond to current and emerging occupational competency, employer and service-delivery needs, and to recommend justified priorities for retention, revision, consolidation or further review through the applicable qualification governance processes.

The specific objectives of the study are to:

1. **Assess occupational relevance and sector demand:** Determine whether the occupations and occupational profiles underlying the qualifications reflect actual sector roles, tasks and responsibilities and respond to demonstrated workforce and service-delivery needs.
2. **Assess qualification design and competency alignment:** Examine whether each qualification's purpose, outcomes, knowledge, practical skills, workplace experience and assessment requirements address the competencies needed to perform its intended occupation across relevant workplace settings.
3. **Assess responsiveness to stakeholder needs:** Determine whether qualifications respond to employers' needs, align with sector skills priorities and applicable professional and regulatory requirements, and reflect appropriate sector consultation.
4. **Assess entry, exit, and progression routes:** Examine whether qualifications provide appropriate and accessible routes for different learner and worker groups, including recognition of prior learning, credit accumulation and transfer, recognised intermediate achievements where applicable, and further learning or occupational progression.
5. **Assess implementation efficiency:** Examine whether institutional systems, stakeholder collaboration and available resources support coordinated and timely delivery of occupational qualifications in accordance with their objectives and curriculum requirements. Identify gaps between qualification design and implementation and assess their implications for learner progression, completion and qualification attainment within planned timeframes.

3. SPECIFIC EVALUATION QUESTIONS

The five core evaluation questions below correspond to the study objectives in the same order. The sub-questions may be refined at inception without materially expanding the contracted scope. Each must be linked to criteria, indicators, evidence sources, respondent groups, methods, judgement rules and limitations in the approved assessment matrix.

Table 1: Evaluation questions

Focus area	Core question and sub-questions
1. Occupational relevance and sector demand	**To what extent do the occupations and occupational profiles underlying the qualifications reflect actual sector roles, tasks and responsibilities and respond to demonstrated workforce and service-delivery needs?** • Which needs informed qualification development, and what evidence supported them? • Do the occupational titles, profiles, tasks and responsibilities correspond to roles performed in sector workplaces? • What evidence establishes demand for these occupations, and how does demand vary across subsectors, employer types and locations? • What evidence supports continuing need for the occupation and recognition of the qualification? • Distinguish demand for the occupation from employer demand for, and recognition of, the particular qualification. • How is it used in recruitment, role assignment and progression? • What explains differences in uptake or recognition across employers? • Are roles or specialisations missing, incorrectly defined or combined inappropriately?
2. Qualification design and competency alignment	**To what extent do each qualification's purpose, outcomes, knowledge, practical skills, workplace experience and assessment requirements address the competencies needed to perform its intended occupation across relevant workplace settings?** • Does the design accommodate relevant differences in tasks and responsibilities across workplace settings? • Where the qualification replaced a legacy qualification, does its design address the occupational needs that motivated the replacement? • Do occupational tasks and the knowledge, practical skills, workplace experience and assessment components cover required competencies? • Are the NQF level, credits, duration and depth of learning appropriate to the occupational requirements? • Which competencies are missing, overemphasised or no longer required? How do requirements vary across service settings?

Focus area	Core question and sub-questions
3. Responsiveness to stakeholder needs and policy priorities	**To what extent do qualifications respond to the needs and priorities of employers, align with sector skills priorities and applicable professional and regulatory requirements, and reflect appropriate sector consultation?** • Does the qualification align with sector skills priorities and applicable professional and regulatory requirements? • Were appropriate employers, practitioners, worker representatives, providers and relevant councils or professional bodies involved? • How did consultation influence the occupational profile, curriculum and assessment requirements? • Where stakeholder needs differ, how adequately does the design address those differences? • Are prescribed learning and assessment requirements feasible and appropriate in intended workplaces? • Which observed difficulties arise from the qualification itself, and which arise from funding, delivery, workplace access, assessment or certification? • What unintended effects occur?
4. Entry, exit, and progression routes	**To what extent do qualifications provide appropriate and accessible entry, exit, re-entry and progression routes for different learners?** • What entry routes exist through prior qualifications, work experience and recognition of prior learning? • Are entry requirements justified by occupational competencies, or do they create avoidable barriers? • Where applicable, can learners accumulate and transfer credits, obtain recognised intermediate achievements, exit and subsequently re-enter? • Do these pathways operate in practice, and what occupational or further-learning value do intermediate achievements offer? • What horizontal and vertical progression opportunities exist, and are they recognised by receiving institutions and relevant employers? • Are progression and articulation arrangements recognised by receiving institutions and employers, and what gaps require action? • Which pathway or workplace requirements disadvantage particular learner and worker groups, and what adjustments are feasible?
5. Implementation fidelity of OC qualifications	**To what extent has the implementation of occupational qualifications (OCs) been efficient?** • How effectively have institutional systems and collaboration among stakeholders supported coordinated and timely implementation? • To what extent have adequate financial, human, infrastructure and workplace resources been available and used efficiently to deliver the OC curricula? • What gaps exist between qualification design, curriculum requirements and implementation, and how have these affected delivery timelines and learner progression? • To what extent have implementation processes supported learners to complete the required learning and assessments and attain their qualifications within the planned timeframes?

4. SCOPE AND METHODOLOGY

4.1 Scope of the assessment

I. The assessment will examine both the original basis for relevance and the qualification's present suitability.
   a. It must establish whose needs informed development, what evidence supported the occupational profile, and how stakeholder contributions influenced the curriculum and assessment requirements.
   b. It must then determine whether those needs remain valid. Changes in workplace tasks, service-delivery arrangements, technology and professional requirements may warrant revision, even where the original development process was appropriately consultative.
   c. Therefore, the study must distinguish demand for an occupation from the suitability of its associated qualification and distinguish qualification design weaknesses from constraints in provision, funding, workplace access, assessment or certification.

II. The individual occupational qualification is the primary unit of analysis. The assessment will cover seven (7) full occupational qualifications, Social Auxiliary Work, Child and Youth Care, Health Promotion Officer, Occupational Health & Safety, Pharmacist Assistant Basic & Post-Basic & Pharmacy Technician. Each will be assessed against its intended occupation, occupational profile, curriculum, assessment requirements and relevant sector needs. HWSETA's role as quality assurance partner must be assessed and verified before the portfolio is finalised.

III. The service provider must develop a qualification mapping framework to be used to link sector needs, occupational roles and tasks, required competencies, qualification components, assessment requirements, recognition and workplace application. The framework must enable the team to examine entry, exit, and progression pathways. Its underlying assumptions must be made explicit and tested against the evidence.

4.2 Data collection methods and minimum coverage

The proposal must set out a detailed data collection plan. As a minimum, the following methods are expected; the service provider may propose additional or alternative methods with justification.

Table 2: Data collection methods and minimum coverage

Method	Requirement
Systematic document and qualification review	Review every in-scope qualification, occupational profile, curriculum, assessment specification, development and consultation record, status record, relevant sector plan and workforce evidence. Maintain a dated source register.
	Analyse available learner, enrolment, completion, certification, provision, workplace and funding records for the agreed period.
	For each qualification, map workplace tasks and required competencies to knowledge, practical skills, workplace experience and assessment components. Record full, partial or absent coverage and validate interpretations through practitioner and employer evidence.

Method	Requirement
Key informant interviews	20 semi-structured interviews across relevant professional or statutory councils, employers and essential qualification or quality stakeholders. Include employers using the qualifications and suitable employers not using them; allocate coverage across the portfolio.
Focus group discussions	Four (4) employer focus group discussions will be conducted: one covering Social Auxiliary Work and Child and Youth Care; one covering Occupational Health and Safety and Health Promotion Officer; one covering Pharmacist Assistant Basic and Post-Basic; and one covering Pharmacy Technician. Each discussion will explore the qualifications separately, with findings analysed and reported by qualification. Each group should include a minimum of six to eight participants, purposively selected for their direct knowledge of the qualifications discussed.
Online questionnaires	Pilot and administer 30 structured online questionnaires covering employers, government, organised labour, professional or statutory bodies, education and training institutions, and research institutions through designated representatives with direct knowledge of the relevant occupation and qualification, with qualification-specific relevance ratings.
Cost benchmarking	Obtain itemised costing of qualifications from providers, employers and available HWSETA administrative sources, supplemented through the existing interviews and focus groups. Include fees, equipment, supervision, workplace experience, assessment, certification and associated learner expenses. Compare providers and pathways of similar occupational purpose, level, credits, duration and delivery requirements. Distinguish actual costs, fees and funding allocations; state the price year, and cost units.
Stakeholder workshop	One workshop after circulation of the draft report to discuss preliminary findings and qualification-level judgements and refine feasible recommendations. This is additional to the 20 interviews and focus groups.

Related qualifications may be examined through occupational clusters, but every qualification requires its own documented assessment and evidence limitations. The following stakeholder groups are to be included as part of the key informant interviews are indicated in Table 3 below. The selection of participants will be discussed during inception.

Table 3: Stakeholders to be interviewed

Stakeholder group	Indicative coverage to be confirmed at inception	Number of interviews
HWSETA officials	HWSETA ETQA (Qualification Development and Maintenance) and RIME Sector Skills Planning	2
Quality and qualifications bodies	QCTO and Subject matter experts (SMEs)	6
Professional councils and relevant professional bodies	SACSSP, SAPC	2
Employers	HPO, Pharmacy, Community health and home-based care; social services and child and youth care; counselling; social security; disability support; pharmacy; occupational health and safety.	10

Total		**20**

4.3 Data analysis and reporting

The service provider is expected to submit and use HWSETA-approved analysis plan that must include missing-data treatment, disaggregation and methods appropriate to achieved coverage. Analysis must be structured around the evaluation objectives, with findings for each evaluation question drawing on triangulated evidence from multiple sources and an explicit statement of the strength of the evidence. Qualitative data should be effectively analysed and triangulated; including analysis of documentary, administrative by qualification and, where available, learner participation status, geography, and employer type.

The service provider must prepare the draft and final reports, comprising of:

- **An executive report** outlining the background, scope, methodology, key findings, limitations, conclusions and recommendations.
- **A main report**, with case studies per qualification excluding annexures, presenting the assessment approach, integrated findings against the assessment questions, conclusions and actionable recommendations.
- **Presentation** of the main findings of the study

Detailed qualification profiles, competency maps, cost benchmarking tables, instruments, the assessment matrix and supporting technical evidence must be included in annexures and clearly referenced in the main report. The main report must provide sufficient evidence and reasoning to support its conclusions.

4.4 Ethical considerations and data management

All data collection must comply with the Protection of Personal Information Act (No. 4 of 2013) and HWSETA's data protection requirements. The team must obtain and record informed consent, explain voluntary participation and the absence of consequences for employment or funding, and protect confidentiality. Learner databases may be used only for this study and must be returned or destroyed at the end of the contract with written confirmation, subject to the agreed audit and retention arrangements.

The service provider must submit a cleaned and validated dataset using HWSETA's approved templates and metadata conventions, capturing all variables required by the analytical framework. To ensure consistency and usability, the service provider must:

- Store personal information securely (encrypted, access-controlled and backed up), keep identifiers separate from analytical data and submit a plan covering transfer, retention, handover and secure deletion.
- apply a structured, standardised coding system, with consistent pre-defined codes for all categorical variables;
- label all variables clearly and provide a detailed codebook, including variable descriptions, value labels, derived-variable definitions and notes on missing data;
- implement quality control throughout collection
- conduct a random back-check (audio review or call-back) of **at least 10%** of completed interviews, document the results, and make them available to HWSETA, with a formal data validation at the mid-point of data collection.

4.5 Stakeholder engagement and validation

The appointed service provider is required to engage HWSETA and relevant stakeholders through inception meetings, interviews, the focus group discussions and one stakeholder workshop. Inception and feedback meetings are routine project meetings and do not constitute additional stakeholder workshops. HWSETA and the provider will agree workshop logistics, representation and accessibility at inception.

5. QUALITY AND REPORTING REQUIREMENTS

The **Senior Evaluation and Impact Assessment Officer** will coordinate communication between HWSETA, its stakeholders and appointed service provider, consolidate comments, facilitate approvals and manage quality of project delivery. Instrument approval, material scope changes, deliverable acceptance and final sign-off must be given by the HWSETA **M&E Manager** who is responsible for the overall quality of the reports produced and for managing the Memorandum of Agreement (MoA). The service provider remains responsible for the overall management of the assignment and its performance.

To enhance the quality and credibility of the evaluation, the HWSETA applies a quality support process that systematically assesses the ToR, the submitted proposal, the inception report, the analytical framework, the data collection tools, the data collected and all reports. The service provider must therefore:

- ensure the reliability, consistency and accuracy of data throughout data collection, synthesis, analysis and reporting;
- subject every deliverable to an internal quality assurance review (by a team member not involved in drafting it) before submission to HWSETA, and indicate in a cover note how HWSETA comments on previous versions were addressed;
- submit reports that are written in plain English, professionally edited and formatted, and that clearly separate findings (evidence), conclusions (interpretation) and recommendations (action);
- attend progress meetings with HWSETA at least every two weeks during fieldwork, and as reasonably required at other stages;
- flag any risk to timelines, data quality or ethics to HWSETA in writing within two working days of becoming aware of it.

HWSETA will make relevant documentation and administrative data available to the service provider, subject to the data protection provisions of this ToR. All intellectual property, datasets, recordings and reports produced under this assignment remain the property of HWSETA and may not be used or published by the service provider without HWSETA's written permission.

5. INTENDED USE AND AUDIENCE

Table 4: Intended use and audience

Intended audience	Intended use of the findings	Decisions informed
HWSETA ETQA and SDP programme management	Assess how occupational qualifications align with occupational roles, competency requirements and sector needs. Distinguish qualification relevance issues from constraints relating to provision, workplace learning and assessment.	Inform priorities for qualification maintenance and review; engagement with quality councils, professional bodies, employers and providers; and adjustments to learner intake, provision and funding within HWSETA's mandate.
HWSETA RIME Division	Use qualification-level findings to strengthen evidence on occupational relevance, competency gaps and factors affecting implementation. Support sector skills planning.	Inform research priorities, evaluation follow-up, monitoring of improvement actions and evidence inputs into sector planning.
HWSETA Board and Senior Management	Consider qualification-level evidence for strategic oversight, accountability and organisational learning, while recognising the responsibilities of external quality and professional bodies.	Inform strategic and funding priorities, approval and monitoring of the management response, and formal engagement with relevant councils, employers and sector stakeholders.

6. EXPECTED TIMEFRAME AND DELIVERABLES

The project is expected to be conducted for 4 months from February to May 2027, with the year confirmed at contracting, subject to confirmation at contracting. The service provider must propose a feasible implementation plan covering inception, piloting, data collection, report writing, quality assurance and final data handover.

Table 5: Deliverables and formats

Phase	Deliverable	Format
Inception	Draft inception report: verified portfolio of full occupational qualifications and a register of related qualification entries examined for context and evaluability assessment; qualification mapping logic; assessment matrix; purposive stakeholder coverage; annotated report outline and draft qualification profile; risks and work plan.	MS Word; MS Excel
	Document review; preliminary competency maps; finalisation of interview and focus-group guides as well as scripting of questionnaire(s).	MS Word; MS Excel
Data collection	20 interviews and 4 focus groups including weekly coverage, participation, quality and risk updates; formal data validation halfway through the approved fieldwork period.	MP3/WAV; MS Word; MS Excel
	Online questionnaires with 30 sector stakeholders	MS Word; MS Excel
	Fieldwork technical report; cleaned administrative and cost datasets, codebook and reconciliation documentation; participant coverage register; de-identified qualitative records	MS Word; Excel/CSV; MP3/WAV

	and coding framework; source and qualification coverage registers.	
Draft report	Complete draft report; profiles for every qualification; completed competency maps; recommendations; analysis scripts.	MS Word; MS Excel; analysis files as applicable
Technical and stakeholder review	HWSETA and stakeholder review, allowing at least ten working days for comments. HWSETA consolidates inputs; provider prepares workshop material, identifies disagreements and proposes evidence-supported resolutions.	MS Word; MS PowerPoint
	One key stakeholder workshop following draft review; presentation, attendance and feedback records, and workshop report.	MS Word; MS PowerPoint
Final report & project closure	Final report, executive report and presentation	MS Word; PDF; MS PowerPoint
	One project closure meeting and evidence handover	MS Word; MS Excel; electronic evidence files

7. COMPETENCY AND EXPERTISE REQUIREMENTS FUNCTIONALITY

Proposals meeting the mandatory requirements in Section 9 will be assessed against 100 functionality points. A minimum of 80 points is required to proceed to the price and preference stage under the procurement rules applicable at issue. The technical proposal must demonstrate assessment expertise as well as data collection capacity. Evaluators will record reasons for scores against the published evidence requirements.

PLEASE NOTE: All bidders provisionally meeting the 80-point functionality threshold on their written proposals may be invited to present their proposed assessment approach and comparable completed assignments before the functionality decision is finalised.

Presentations clarify submitted evidence against the same published criteria and 100-point maximum; they carry no additional points and may not introduce a materially new proposal or substitute personnel.

Where Artificial Intelligence (AI) was used, service providers are required to declare; this requires a transparent disclosure of how and where AI tools were used, Annexure B.

<table>
<tr><th>FUNCTIONAL CRITERION</th><th>KEY COMPONENTS</th><th>MAXIMUM POINTS AVAILABLE</th></tr>
<tr><td>Assessment team</td><td>Name the team leader, occupational curriculum specialist and qualitative researcher. The team leader and curriculum specialist must be different people. Submit CVs and qualification evidence and complete the team table. Provide a project list for the team leader, up to ten projects.

The qualitative researcher is scored on years in the role. Identify internal quality assurance and administrative/cost-analysis support in the proposal; these are delivery requirements and do not create additional scored team roles.

<table>
<tr><th>Sub-criterion</th><th>Scoring</th></tr>
<tr><td>Team leader qualification

10 points</td><td>Relevant Master’s degree: 5; PhD degree: 15; below Masters or no evidence: 0.</td></tr>
<tr><td>Team leader/organization projects undertaken
20 points</td><td>At least five (5) years’ experience delivering similar assignments in areas of education, curriculum development and skills development. This is to be supported by at least two (2) references and a project list

5 or more projects = 10 points

3-4 or more projects = 5 points;

2 project= 3 points;

1 project= 2 points;

none = 0</td></tr>
<tr><td>Team’s experience in conducting qualitative studies

20 points</td><td>Relevant qualitative research experience in this role:

Greater than 10 KII interviews + focus groups=20pts

Between 5 - 10 KII interviews +focus groups=10pts

Fewer than 5 KII interviews and no focus groups=0points</td></tr>
</table>

<u>Team experience</u>

Each of the three roles (team leader, curriculum/qualification development, qualitative research) scores on years of experience in that role:

5 or more years = 3.3 points;</td><td>[45 points]

[10 points]</td></tr>
</table>

<table>
<tr><td></td><td>3–4 years = 2.5 point;
less than 3 years or role not filled = 0. Points for the four roles added together.

<table><tr><th>Role</th><th>Name</th><th>Qualification</th><th>Relevant experience</th><th>Years</th></tr><tr><td>Team leader</td><td></td><td></td><td></td><td></td></tr><tr><td>Qualification development/
Curriculum specialist</td><td></td><td></td><td></td><td></td></tr><tr><td>Qualitative researcher</td><td></td><td></td><td></td><td></td></tr></table>Team leader projects: list up to ten completed projects. Each completed project must be substantiated in the CV. HWSETA may contact references.
<table><tr><th>Project title</th><th>Client</th><th>Completion date</th><th>Study type</th><th>Qualification/curriculum assessed</th><th>Reference name phone email</th></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table></td><td></td></tr>
<tr><td>Organisational track record</td><td>References must be dated, identify the client, named assignment, scope and completion date, and contain a signature and verifiable signatory contact. Supply evidence of assignments completed within the five years preceding the closing date. The same reference may support more than one criterion where it explicitly demonstrates the required experience. References and personnel evidence may be verified. The five-year requirement applies to organisational track-record evidence; the team-leader project list uses the separate 2018–2026 window specified in the team assessment.

<table><tr><th>Sub-criterion</th><th>Scoring</th></tr><tr><td>Relevant completed research or evaluation assignments 20 points</td><td>None: 0; one: 5; two: 10; three or more: 20.</td></tr><tr><td>Occupational qualification or curriculum relevance assessments 15 points</td><td>None: 0; one evidenced assignment: 5; two or more: 10.</td></tr><tr><td>Health and welfare sector research 10 points</td><td>At least one evidenced completed assignment: 10; none: 0.</td></tr></table></td><td>[45 points]</td></tr>
<tr><td>Total functionality</td><td>A minimum of 80 out of 100 functionality points is required to proceed to the price and preference stage.</td><td>100 points</td></tr>
</table>

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8. PRICING

The proposed project price must be **inclusive of VAT** and must be valid for at least 90 days from the closing date.

- HWSETA may require a breakdown of rates for any priced item, and service providers are required to provide it.
- HWSETA reserves the right to negotiate the selection or prioritisation of deliverables in line with the contract price.
- Payment will be made against deliverables approved by HWSETA, in line with the payment schedule agreed at contracting.

The following table must be used for the quotation; additional detail (including daily rates and the number of days per team member) may be provided in the service provider's own format in addition to (not instead of) this table. Enter activity amounts excluding VAT, followed by the subtotal excluding VAT, VAT where applicable and the total inclusive of VAT. The analysis and reporting price must include administrative evidence analysis, cost benchmarking, draft reporting and revisions.

Table 7: Pricing schedule (activity amounts excluding VAT)

Activity	Deliverable	Quoted amount R excluding VAT
Inception	Inception report	
	Document review and occupational competency mapping & presentation	
	Development and scripting of online questionnaire(s)	
Data collection	20 key informant interviews including transcription	
	Pilot & administer 30 Online questionnaires with sector stakeholders	
	Four focus groups including transcription	
	Weekly fieldwork progress report & Final fieldwork report	
Data analysis, validation and reporting	Data cleaning, transcription, coding and analysis, including administrative evidence, cost benchmarking, draft report and revisions	
	One stakeholder validation workshop and workshop report	
	Final report, executive report and presentation	
Subtotal excluding VAT		
VAT where applicable		
TOTAL INCLUSIVE COST		

9. MANDATORY REQUIREMENTS

The following documents and information must be submitted with the proposal. Proposals that do not include all mandatory documents will be disqualified and will not be evaluated for functionality.

1. Full technical proposal, including the proposed methodology, a detailed work plan aligned to the deliverables in this ToR, and the completed team tables
2. Detailed CVs of the project manager and all team members listed in the team tables
3. Company registration documents, Proof of registration on the National Treasury Central Supplier Database (CSD)
4. The service provider's business address and contact person (name, e-mail address and telephone number)
5. Certified copies of qualifications of the team members (certification not older than six months). International qualifications must be verified by SAQA, with a copy of the verification letter attached
6. At least one reference letter. A submitted letter that does not meet the consolidated validity requirements in Section 7 receives 0 points for the relevant functionality component.
7. Completed pricing schedule (Section 8)
8. Signed POPIA consent form (Annexure A)
9. AI declaration Statement (Annexure B)

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ANNEXURES

ANNEXURE A BIDDER PERSONAL INFORMATION CONSENT

For the Health and Welfare Sector Education and Training Authority (HWSETA) to consider the applicant's response to this 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.

Access to personal information and purpose specification: The HWSETA will process the service provider's personal information in accordance with its Privacy Policy, for the purposes of assessing the service provider's submission in relation to the advertised EOI and of assessing current services required by the HWSETA. The HWSETA 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. 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, the service provider voluntarily consents to the HWSETA, as the Responsible Party in terms of POPIA, collecting, processing, storing and verifying its personal information for purposes related to the evaluation, adjudication and administration of this bid submission.

The service provider understands that this processing may include, where necessary, the disclosure of personal information to authorised third parties or service providers engaged by the HWSETA strictly for these purposes. The HWSETA will ensure that all personal information is processed lawfully, stored securely and used only for the purpose for which it was collected, in accordance with POPIA and the HWSETA's Privacy Policy.

The service provider acknowledges that it may withdraw its consent in writing at any time by notifying the HWSETA at research@hwseta.org.za. However, it understands that withdrawal of consent may limit the HWSETA's ability to evaluate or process the bid submission. All personal information will be retained only for as long as necessary to fulfil the purposes outlined above and will thereafter be securely destroyed or de-identified in accordance with applicable legislation.

This consent concerns bidder information for procurement. It does not replace research participant consent or the assignment’s data management arrangements.

Yes ☐ **No** ☐

Supplier name	Date	Signature

ANNEXURE B: ARTIFICIAL INTELLIGENCE DECLARATION STATEMENT

Artificial Intelligence Tool: [description of tools used];

[Heading]: [description of AI use in that stage of the work/proposal]