REQUEST FOR EXPRESSION OF INTEREST (EOI)

The HWSETA hereby invites proposals from competent service providers with proven experience in conducting track and tracer studies through Computer-Assisted Telephonic Interviews (CATI) or equivalent telephonic systems and qualitative methods to implement the study to explore career pathways for workers.

EOI particulars	Submission details
Title of the EOI	Track and Trace Study for Workers Funded by the HWSETA
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-00010]"
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

TRACK AND TRACE STUDY FOR WORKERS FUNDED BY THE HWSETA

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1. BACKGROUND AND CONTEXT

The Health and Welfare Sector Education and Training Authority (HWSETA) advances skills development in South Africa's health and social development sectors. Its mandate is situated within the Skills Development Act (No. 97 of 1998, as amended), the Skills Development Levies Act (No. 9 of 1999) and the National Skills Development Plan (NSDP) 2030. Through funding and support for learning programmes, HWSETA seeks to strengthen the supply of relevant skills, improve workforce capability, and support the delivery of health and social development services. The National Development Plan (NDP) 2030 and HWSETA's Sector Skills Plan provide a broader development and sector-planning context for these interventions.

For workers already in employment, HWSETA-funded learnerships, artisan programmes and bursaries are intended to develop occupational knowledge and practical skills, address competency gaps and support further qualification and career development. These results depend on whether workers can apply their learning in workplace tasks, perform their roles more effectively, and access relevant employment and further-learning opportunities. Workplace conditions, supervision, the fit between learning and job responsibilities, and opportunities to use acquired skills may enable or constrain these outcomes.

The value of these interventions extends beyond successful programme completion. Completion and certification establish that workers have met programme or qualification requirements, but do not, on their own, establish improved workplace competence. Similarly, promotion, changes in earnings or continued employment cannot automatically be attributed to the funded intervention. A worker tracer study is therefore required to examine competence improvement and the application of learning alongside employment and career pathways, while distinguishing workers' perceptions from corroborated workplace changes and formal assessment evidence where available.

HWSETA's 2025–2030 Strategic Plan includes outcome indicators concerning competence improvement following successful completion of funded learnerships, artisan programmes and bursary-funded qualifications. The RIME Division requires evidence to assess these outcomes during the strategic period and to inform programme design, workplace learning support, resource allocation, and monitoring.

The study will focus specifically on evidence toward the measurement of the following HWSETA outcome indicators:

Table 1: Indicators to be assessed

Outcome indicator	Description in the M&E Programme
4-16 learnerships	Number of workers whose competence is improved after successful completion of the learnership programmes of the HWSETA by the end of the strategic period.
4-17 apprentices/artisanship	Number of employed apprentices whose competence is improved after successful completion of the Artisan programmes of the HWSETA by the end of the strategic period.
4-19 undergraduate	Number of workers whose competence is improved after successful completion of the qualifications funded through the undergraduate bursary programme of the HWSETA by the end of the strategic period.
4-19 postgraduate	Number of workers whose competence is improved after successful completion of the qualifications funded through the post-graduate research bursary programme of the HWSETA by the end of the strategic period.

2. MAIN GOAL AND OBJECTIVES

The goal of the study is to measure the extent to which HWSETA-funded qualifications lead to improved worker productivity, competency, career progression, and enhanced livelihood (Strategic Indicators 4-16, 4-17, 4-19) by identifying and mapping the employment career pathways undertaken by employed workers post-qualification. Specifically, it must respond to the following specific objectives;

1. To evaluate the contribution of HWSETA-funded interventions to workplace performance and competency development.
2. To assess the quality and stability of employment among graduates, including contract type, benefits, job security, and opportunities for advancement. Crucially, this includes determining the change in salary/wage after obtaining the qualification.
3. To examine how HWSETA qualifications are utilised and applied in current employment roles, including the relevance of skills to job functions and responsibilities.
4. To explore career progression and professional development opportunities, including promotions, upskilling, mentorship, and alignment with long-term career goals.
5. To understand the alignment between graduates' current employment and their fields of study, including the degree to which the employment matches their qualification and intended career pathway.
6. To determine learner perceptions towards the programme (i.e., its value, quality, and effectiveness).

3. SPECIFIC STUDY QUESTIONS

The study must address the focus areas and sub-questions presented in the table below, aligned with the study objectives and the HWSETA worker tracer questionnaire. These cover five post-completion pathways: remaining with the same employer, moving to a new employer, self-employment, becoming unemployed and further study. Competency development, qualification use and learner perceptions must be assessed across these pathways, with comparisons by programme type and relevant learner characteristics where the data permit. Employment status and further study must be captured separately: further study may overlap with any employment pathway. Record employment transitions over time and the status at interview rather than forcing overlapping pathways into mutually exclusive categories.

Table 2: Study focus areas and sub-questions

Focus area	Sub-questions
1. Remaining with the same employer: progression and workplace application	a) What changes occurred in graduates' occupational level, responsibilities or specialisation after qualification? b) Were graduates promoted, how soon after qualification, and what role did the qualification play? c) How did monthly salary/wage bands and employer contributions to pension, UIF and medical aid change? d) How closely does their work relate to the qualification? e) To what extent do graduates use acquired knowledge and skills, carry out required tasks and perform their work better?

2. Moving to a new employer: job mobility and employment quality	a) How soon after qualification did graduates move to a new employer, and did the move require relocation? b) What sectors and types of organisations did they move into? c) Was the qualification required, preferred or otherwise helpful in obtaining the new job? d) How closely does the new job relate to the qualification, and does it involve greater responsibility or specialisation? e) How are acquired skills used in the new role, and how do graduates assess their contribution to performance? f) How did employment type, monthly salary/wage bands and employer-provided benefits change?
3. Self-employment: enterprise formation, qualification use and income generation	a) When did graduates establish their business or income-generating activity, and what motivated them? b) What form does the activity take, and what goods or services does it provide? c) How did the qualification contribute through technical skills, confidence, credibility, compliance readiness, networks or business management? d) How closely does the activity relate to the qualification, and was the qualification formally required? e) What are the registration status, ownership structure, start-up funding sources and number of people employed? f) What monthly business revenue and personal income are generated, reported separately? g) What constraints affect the activity, and what support is needed?
4. Becoming unemployed: employment interruption and access to work	a) Were graduates employed after completion, and when did they become unemployed? b) What caused employment to end, and how long have they been seeking work? c) Are they currently looking for work, what methods do they use, and how many applications have they submitted? d) What types of work, sectors and organisations are they targeting? e) How relevant is the qualification to the work they seek? f) What barriers hinder access to employment, including qualification recognition, certification delays, experience, location and job-search costs? g) What support would help them secure employment?
5. Further study: educational progression and career development	a) Are graduates studying full-time, part-time or while working, and have they completed, continued or discontinued their further qualification? b) What qualification, field and institution did they enter, and when? c) Did they pursue specialisation, a higher qualification, a different occupation or professional requirements? d) How does further study relate to the HWSETA-funded programme? e) Did the funded qualification enable admission, strengthen their application or prepare them for further study?

	f) Who funds their studies, and what are their intended pathways afterwards?
6. Competency development, workplace performance and qualification use across pathways	a) How do graduates rate their knowledge before and after the intervention? b) Did they complete a formal assessment, trade test or certification? c) Can they now perform tasks they could not perform, or were not authorised to perform, before qualification? d) To what extent has the qualification helped them work faster, handle more work, make fewer mistakes, work independently, undertake difficult tasks and provide better services? e) How have they used their certificate for job applications, promotion, further-study admission or demonstrating skills to employers and clients? f) How do these outcomes differ across the five pathways?
7. Learner perceptions of programme value, quality and effectiveness	a) How do graduates assess the programme's overall quality? b) How satisfied are they with the programme? c) To what extent do they believe the qualification provided a career pathway? d) Would they recommend the programme to others? e) What improvements do they suggest? f) How do perceptions differ across programmes and the five pathways?

4. SCOPE OF WORK

4.1 Study population and sampling

The study must examine career progression pathways and labour market outcomes among learners who were employed when they entered an HWSETA-funded programme and subsequently completed it successfully. It is expected to generate credible, disaggregated evidence for the study on graduates who remained with the same employer, moved to a new employer, entered self-employment, became unemployed or pursued further study.

The study population comprises 1,028 workers who successfully completed the specified HWSETA-funded programmes. HWSETA will provide learner records disaggregated by programme and year. Graduates who are currently unemployed remain eligible, provided that they were employed at programme entry and successfully completed the funded programme.

The appointed service provider must use a census sampling approach and attempt to contact all 1,028 eligible learners. The service provider must report the number of learners contacted, interviews attempted, and valid interviews completed separately.

Table 3: Study sample

Programme	Total target
Learnerships	734
Artisans	45
Postgraduate & Undergraduate Bursaries	249
TOTAL	1,028

4.2 Data collection

4.2.1 CATI/Telephonic interviews

HWSETA will develop and provide one questionnaire to the service provider. The service provider is expected to administer 1,028 surveys primarily through Computer-Assisted Telephone Interviewing (CATI) or alternative telephonic interview system. SMS, WhatsApp and e-mail should support tracing and appointment scheduling, where telephonic interviews are unsuccessful. Interviews should take approximately 20–25 minutes, subject to piloting. The service provider must:

- Review and script the questionnaire as issued with routing logic. Corrections arising from piloting take affect only with HWSETA written approval.
- Make at least three call attempts at varied times and on different days, including an evening or Saturday attempt, before coding a worker as non-contact.
- Trace unreachable learners using alternative methods such as, SMS, WhatsApp, e-mail and social media.
- 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.
- Obtain consent before interviews and separate consent for recording. Log unsuccessful attempts without recording third parties or non-consenting individuals.
- Report weekly progress by programme and cohort, with achieved valid surveys, non-response, tracing actions and risks to targets.

4.2.2 Focus group discussions

In addition to CATI surveys, the service provider must conduct three (3) focus group discussions: one combining undergraduate and postgraduate bursary beneficiaries, one for learnership and artisanship beneficiaries, each. HWSETA will develop and provide focus group discussion guides to the service provider. The questionnaire must include a "Consent to Contact" Question, add a checkbox asking: *"Would you be open to participating in a short, follow-up focus group discussion regarding your answers?"* Targeted email/whatsapp follow-up communication should be sent to various learners across qualifications to ensure effective coverage. Each group must include a minimum of six to eight participants.

Discussions should be held virtually or by telephone conference, including suitable mobile applications such as Whatsapp that enable audio recording. The facilitator is expected to obtain separate informed recording consent from every participant before recording. Where a participant declines recording, offer an unrecorded individual discussion captured in detailed de-identified notes and document this substitution.

Table 4: Focus group purposes and focus areas

Focus group	Main pathway to investigate	Priority focus areas
Learnerships	Occupational development and improved performance within existing employment	• Opportunities to apply learning; supervisory support; changes in duties or responsibility; recognition through grading, pay or promotion; reasons qualifications are underused.
Undergraduate and postgraduate bursaries together	Professional development, specialisation and career mobility	• **Undergraduate:** access to qualified roles, progression from previous qualifications and further study. • **Postgraduate:** specialist responsibilities, professional mobility, research application and movement between employers. For both: whether qualification gains translate into relevant work, improved conditions or advancement.
Artisanship	Progression towards recognised trade competence and its use in employment	• Workplace exposure and mentoring; access to the required tasks and equipment; assessment and trade-test transitions; transition into artisan duties; recognition through job designation, grading and pay; barriers to practising the trade or finding relevant work.

4.3 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 will 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, including independent CATI script testing by at least two people, a pilot of 103 eligible learners (10% of the 1,028-learner population, rounded up). Pilot learners form part of the census; valid pilot interviews may count towards the 1,028 completions if they meet the final approved instrument and quality requirements. Re-interview affected pilot learners where substantive instrument changes occur, range and routing checks, duplicate and date-consistency checks, and cross-referencing against certification records.

4.4 Data analysis and reporting

The HWSETA will provide an analytical framework to be used to analyse findings based on the scope of data collected. Analysis must follow the approved framework; deviations require written HWSETA agreement. As a minimum, the analytical framework must be used by the service provider to:

- map every objective and study question to the questionnaire items, derived variables, indicators and analytical methods that will answer it (an analysis matrix);
- specify disaggregations and minimum subgroup reporting thresholds, including suppression or aggregation where small cells risk identification or unreliable interpretation;
- Present results by occupational qualification, certification cohort, NQF level, gender, age, disability, province and employment pathway where coverage permits. Account for different elapsed times since certification.
- Specify appropriate descriptive statistics and uncertainty measures, tests of association and multivariate analysis where sample size and data quality permit and explicitly report non-response. Qualitative evidence must not be weighed.
- specify how qualitative data will be analyzed and integrated with the survey findings;
- State non-response and comparability limitations and distinguish association or perceived contribution from causal impact.

Before fieldwork, HWSETA will also approve indicator definitions, competence-improvement measurement rules and acceptable supporting evidence. Distinguish self-reported improvement from corroborated or formally assessed improvement in in indicator calculations.

The service provider is expected to submit consenting recordings linked to study IDs; a fieldwork technical report, documented validation checks, and an evidence register supporting indicator calculations. Personal identifiers must not appear in public reports or de-identified analytical materials. Qualitative findings must not be presented as representative of the

population. The service provider will be expected to submit de-identified transcripts of recorded discussions and detailed de-identified notes of any approved unrecorded alternatives, and a documented thematic analysis integrated with the survey findings.

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 project management and the quality of its outputs. Attend progress meetings at least every two weeks during fieldwork and as reasonably required at other stages. 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

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:

- Maintain traceability from source data, calculations, and findings. Clearly separate observed, estimated, self-reported, and corroborated results.
- Apply internal review by a team member who did not draft the deliverable. Check data quality, calculations, consistency, and confidentiality.
- Submit a response matrix with each revised report and explain how comments were addressed.
- Notify HWSETA within two working days of material risks to ethics, data quality, survey targets, or timelines.
- Provide professionally edited reports by distinguishing findings, conclusions and actionable recommendations.

HWSETA will assess deliverables against the agreed scope, valid survey totals, analytical framework, and evidence standards. The provider may not use or publish confidential data without written authorization. All datasets, codebooks, scripts, recordings, transcripts and reports produced under this assignment remain the intellectual property of HWSETA

6. EXPECTED TIMEFRAME AND DELIVERABLES

The study will run for approximately four months, starting in February 2027 and ending in May 2027, subject to confirmation at contracting. The service provider must propose a feasible implementation plan covering inception, piloting, fieldwork, analysis and reporting.

Table 5: Deliverables

Phase	Deliverable	Format
Inception	Inception report detailing qualification and cohort coverage; objectives; sampling and response strategy; contact protocol; QA, ethics and data protection; risk mitigation; detailed work plan;	MS Word
	Approved scripted questionnaire and qualitative guides; consent forms; HWSETA approval of participant consent and data-protection arrangements before fieldwork; HWSETA must confirm at inception whether external ethics clearance is required, and the provider must obtain it before fieldwork if required	CATI script; MS Word
Fieldwork	Piloting and administering 1,028 valid worker surveys and three worker focus groups (one combined undergraduate/postgraduate bursary group, one learnership group and one artisanship group); weekly progress and QA reports; formal mid-point validation.	MP3 / WAV; Excel / CSV / SPSS; MS Word
	Fieldwork report; survey data and codebook; disposition file, audio recordings.	MS Word; MS Excel
Data analysis and reporting	Draft report with disaggregated findings, with detailed limitations, analysis files and tables.	MS Word; MS Excel
	One virtual validation session; presentation and comments record.	MS Word; MS PowerPoint
	Final report including conclusions and evidence-based recommendations; executive summary; final datasets and syntax; response matrix; presentation; one-page infographic	MS Word; MS PowerPoint; MS Excel

8. COMPETENCY AND EXPERTISE REQUIREMENTS (FUNCTIONALITY)

Proposals that meet all mandatory requirements (Section 8) will be scored against the criteria below. **A minimum of 80 out of 100 points** is required to proceed to price and specific goals. Every criterion is scored from the information in the proposal, the completed team tables and the attached documents.

Service providers may be required to present their proposals as part of the evaluation process.

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 6: Functionality scoring sheet

Criterion	Scoring	Points
1. Organisational capacity (25 points)		
1.1 CATI and online survey system	Each of the following five functions scores 2 points if the proposal fully describes it, including the specific system or procedure used; otherwise, 0: • management and secure storage of personal information in line with POPIA, including back-ups (2) • CATI system and software to be used (2) • recording, labelling and provision of audio files (2) • quality control process (back-checks and data validation) (2) • online, SMS and WhatsApp survey capability (2)	10
1.2 Previous experience with CATI surveys	Capability to handle high-volume calling while maintaining high data accuracy, scored on the largest single CATI project shown in a reference letter or in Table C (Sample size column); • fewer than 500 respondents in one project= 2 between 500 and 1, 000 respondents in one project= 3 • greater than 1, 000 respondents in one project= 5	5

1.3 Fieldworkers / CATI operators
(Table A)
	At least three operators/fieldworkers listed, each speaking at least three official languages fluently and with at least three years' CATI experience. If this minimum is not met, scores 0.
	Scored on the weakest operator listed:
	• ***Languages:***
	all speak 3 = 2 points;
	all speak 4 or more = 5 points
	• ***CATI experience:***
	all have 3 years = 2 points;
	all have 4 or more years = 5 points
		10

2. Experience of the project team (15 points)		

Criterion	Scoring	Points
2.1 Previous experience in implementing similar projects. (Table C)	Confirmation that your organisation has a track record of at least five (5) years in implementing similar projects. This is to be supported by at least two (2) references and a project list 5 or more projects = 5 points 3-4 or more projects = 3 points; 2 project= 2 points; 1 project= 1 point; none = 0	5
2.2 Core team (Table B)	Each of the four roles (questionnaire scripter, data analyst, qualitative researcher / FGD facilitator, report writer) scores on years of experience in that role: 3–4 years = 1 point; 5 or more years = 2.5 points; less than 3 years or role not filled = 0. Points for the four roles added together.	10
3. Qualifications of the project team (25 points)		
3.1 Team leader (1 person)	Social Sciences-related field, Statistics, Monitoring and Evaluation, Development Studies, Demography, Economics or health-related field Master's degree = 5 points; doctoral degree = 10 points; below master's degree = 0	10
3.2 Core team (at least 2 people from Table B, one of them the data analyst)	Social Sciences-related field, Statistics, Development Studies, Demography, Economics or health-related field Honours degree = 5 points; master's degree or higher = 10 points; below honours degree = 0.	10
3.3 Fieldworkers, at least 2 from Table A	Fieldworkers; Matric and above= 5points Below matric= 0points	5
4. Organisational track record (35 points)		
4.1 Reference letters	At least two valid reference letters for research or evaluation services, dated between 2018 and 2026, at least one of them for work completed in the past 36 months = 10 points; otherwise 0 (and 4.2 and 4.3 also score 0)	10
4.2 CATI data collection	At least one valid letter confirms that the service provider used telephonic interviews/CATI for data collection = 10 points	15
4.3 Tracer or labour market research	At least one valid letter confirms a tracer study, evaluation, labour market or SETA research = 10 points	10
Total	**Minimum 80**	**100**

Qualifications: certified copies are required, with certification not older than six months. International qualifications must be verified by SAQA, with a copy of the verification letter. Missing qualifications/uncertified/older than 6months certified qualifications score 0.

Reference letters are valid only if they are on the client's letterhead, dated and signed, name the specific study undertaken, and state the signatory's organisation, position and contact details (including an e-mail address). HWSETA may contact referees: a letter is invalid if the referee does not respond within five working days or does not confirm it. References must be contactable and may be verified.

Team tables A-C must be copied into the proposal and completed, with a CV attached for every person listed. A table that is missing or incomplete scores 0 for the related criterion. Listed team members may not be replaced after submission without HWSETA's written approval.

Table A: Fieldworkers / CATI operators (at least three)

Name and surname	Title	Official languages spoken fluently	Years of CATI experience

Table B: Team leader and core team

Role	Name and surname	Highest qualification	Years in this role
Team leader			
Questionnaire scripter			
Data analyst			
Qualitative researcher / FGD facilitator			
Report writer			

Table C: projects undertaken by the team leader. List up to ten research or evaluation projects completed between 2018 and 2026 in which the team leader took part, starting with the most recent. For each project give the type of study (tracer, impact, evaluation, survey or other), the methods used (e.g. CATI, FGDs, interviews), the team leader's role (lead or team member), and a contactable reference (name, telephone and e-mail). A project counts towards criterion 2.1 only if every column is completed, including a contactable reference, and the project also appears in the team leader's CV. HWSETA may contact the references listed.

Table C: Projects undertaken by the team leader (2018–2026, maximum ten)

#	Project title	Client	Year	Type of study	Methods used	Sample size	Reference
1							
2							

#	Project title	Client	Year	Type of study	Methods used	Sample size	Reference
3							
4							
5							

Add rows as needed, up to ten projects.

9. 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 prioritization 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 details (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. Please indicate activity amounts excluding VAT, followed by the subtotal excluding VAT, VAT where applicable and the total inclusive of VAT. Please note that, payments depend on accepted deliverables rather than elapsed time.

Table 7: Pricing schedule (activity amounts excluding VAT)

Activity	Deliverable	Quoted amount R excluding VAT
Data instruments and fieldwork training	Development and scripting of data collection instruments	
	Enumerator training	
Data collection	Conduct full 1,028 completed worker surveys including contact attempts and follow-ups	
	3 worker focus groups including transcription, virtual or teleconference call	
Data analysis and reporting	Data analysis files and draft report	
	Final report, executive summary report, one-page infographic, presentation, and final datasets.	
Subtotal excluding VAT		
VAT where applicable		
TOTAL inclusive of all costs		

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10. 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. Technical proposal, including methodology, draft analytical approach, FGD recruitment plan, work plan and the completed team tables A-C (Section 4)
2. CVs of the team leader and all listed team members, and certified copies of qualifications, not older than six months (SAQA verification for foreign qualifications)
3. Company registration documents, proof of registration on the National Treasury Central Supplier Database (CSD), business address and contact person
4. The service provider's business address and contact person (name, e-mail address and telephone number)
5. Reference letters meeting the requirements in Section 4
6. Completed pricing schedule (Section 7)
7. Signed POPIA consent form (Annexure A)
8. AI declaration Statement (Annexure B)

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 HWSETA strictly for these purposes. 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 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.

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]