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 employment pathways for unemployed individuals.

EOI particulars	**Submission details**
Title of the EOI	Track and Tracer Study of Unemployed Learners Funded by HWSETA: Exploring Pathways – 2026/27
Date of this EOI	03/11/2026
EOI reference number	HWSETA-26/27 EvalResearch-0005
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-0005]”
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 TRACER STUDY OF UNEMPLOYED PERSONS FUNDED BY THE HWSETA:

EXPLORING PATHWAYS FROM LEARNERSHIPS, INTERNSHIPS, ARTISAN PROGRAMMES AND BURSARIES

CONTENTS

1. BACKGROUND AND CONTEXT 3
2. OBJECTIVES AND STUDY QUESTIONS 4
3. SCOPE OF WORK 5
   3.1 Study population and methods 5
   3.3 Survey 5
   3.4 Focus group discussions and key informant interviews 6
   3.5 Ethical considerations and data protection 6
   3.6 Data analysis and reporting 7
4. COMPETENCY AND EXPERTISE REQUIREMENTS (FUNCTIONALITY) 8
5. TIMEFRAME AND DELIVERABLES 11
6. ROLES, RESPONSIBILITIES AND CONTRACT MANAGEMENT 11
7. PRICING 13
8. MANDATORY REQUIREMENTS 13

ANNEXURE A: CONSENT IN TERMS OF SECTION 11 OF THE PROTECTION OF PERSONAL INFORMATION ACT, 2013 (POPIA) - BIDDER PERSONAL INFORMATION CONSENT 15

ANNEXURE B: ARTIFICIAL INTELLIGENCE DECLARATION STATEMENT 16

1. BACKGROUND AND CONTEXT

The Health and Welfare Sector Education and Training Authority (HWSETA) funds learnerships, graduate internships, artisan programmes and bursaries for unemployed people, with the aim of improving their employability and their access to work in the health and social development sectors. This is in line with the Skills Development Act (No. 97 of 1998), the National Skills Development Plan 2030 and the SETA Grant Regulations. HWSETA needs credible evidence of what happens to these learners after they complete their programmes: whether they find work, what kind of work, and what stands in the way of those who do not.

Completing a programme shows that a learner met its requirements; it does not, on its own, show that later employment was caused by the programme, since employment also depends on local labour demand, host employer practices and learners' own networks. The study must therefore describe what happens to completers and explain the factors behind it, clearly separating what is observed, what learners report and what is corroborated by other evidence and must not present associations as proof of impact.

The study forms part of HWSETA's 2026/27 Monitoring and Evaluation Programme contributes to Annual Performance Plan indicator 10 and provides measurements for the mid-term review of the 2025–2030 Strategic Plan.

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

Table 1: Outcome indicators to be assessed

Outcome indicator	Description in the M&E Programme
3-12	Number of unemployed persons who find employment after successfully completing internships for graduates funded by HWSETA by the end of the strategic period.
3-13	Number of unemployed persons who find employment after successfully completing learnerships funded by the HWSETA by the end of the strategic period.
3-15	Number of unemployed apprentices who find employment after successfully completing artisan programmes funded by the HWSETA by the end of the strategic period.
5-24 (a)	Number of unemployed persons who find employment after successfully completing undergraduate qualifications funded through HWSETA undergraduate bursary programmes by the end of the strategic period.
5-24 (b)	Number of unemployed persons who find employment after successfully completing postgraduate research qualifications funded through HWSETA postgraduate bursary programmes by the end of the strategic period.

The HWSETA hereby invites proposals from competent service providers with proven experience in collecting programme evaluation data using Computer-Assisted Telephonic Interviews (CATI) to implement the 2026/27 Tracer study to conduct a thorough exploration of pathways for the unemployed beneficiaries.

2. OBJECTIVES AND STUDY QUESTIONS

The study must respond to the following objectives:

1. To determine the number and proportion of completers who have found employment, by programme.
2. To assess the nature and quality of that employment, and how completers use their qualifications, including in self-employment.
3. To examine pathways into further education and training.
4. To understand why some completers have not found work, and what would help them.
5. To compare outcomes across programmes and with previous HWSETA tracer studies and benchmark them against national labour market data.

The study questions are organised by the pathway each completer has followed since completing the programme, matching the routing of the HWSETA questionnaire. Each respondent is assigned to one current pathway, and results are compared across pathways and programmes.

Table 2: Study questions by pathway

Pathway	Study questions
1. All completers: employment outcomes	a) What proportion of completers in each programme are employed, self-employed, studying or unemployed? b) How long after completion did they find their first job, and how has their status changed since completion? c) How do outcomes differ by programme, NQF level, province, gender, age, disability and time since completion?
2. Employed (absorbed by the host employer or employed elsewhere)	a) Were they absorbed by their host employer, or did they move to another employer, and how did they find the job? b) Was the qualification required for, or helpful in getting, the job? c) In which sector and occupation do they work, on what contract, and at what income and benefits? d) How closely is the work aligned with the qualification, and are the acquired skills used?
3. Self-employed (exploratory)	a) When and why did they start the activity, and what goods or services does it provide? b) How did the qualification contribute (skills, credibility, compliance, networks)? c) Is the business registered, how many people does it employ, what income does it generate, and what support is needed?
4. Further study	a) What are they studying, at what NQF level, where, and full- or part-time? b) Did the programme enable admission or prepare them for further study, and who funds it?
5. Unemployed	a) Did they work at all after completion, and if so, why did the work end? b) How long have they been looking for work, by what methods, and with how many applications? c) What barriers do they face (e.g. certification delays, lack of experience, location, job-search costs), and what support would help?

Pathway	Study questions
6. Across all pathways	a) How do completers rate the programme's quality, relevance and value, and would they recommend it? b) How have outcomes changed since previous HWSETA tracer studies, and how do they compare with national outcomes for young people with similar education? c) What changes to programme design, targeting and host employer selection would improve employment outcomes?

3. SCOPE OF WORK

3.1 Study population and methods

The study population comprises unemployed learners who completed HWSETA-funded programmes reported in the 2025/26 financial year.

Table 3: Study population

Programme	Total
Internship	530
Learnership	1,018
Artisanship	163
Bursaries (undergraduate and postgraduate)	553
Total	**2,264**

The service provider is required to,

- Track and trace **2,264** learners that have completed HWSETA-funded internship, learnership, artisanship and bursaries programmes;
- Utilise census sampling approach to conduct telephonic interviews using Computer Assisted Telephonic Interviews (CATI);
- Conduct **two** virtual focus group discussion with survey respondents, comprised of at least 6-8 participants;
- Conduct **four** virtual interviews with host employers or training providers to explain the survey findings.
- Data analysis and report writing....

3.3 Survey

HWSETA will provide one core questionnaire for all programmes (approximately 20 minutes). The service provider is required to,

- Review and script the questionnaire as issued, with routing logic. Corrections arising from the pilot take effect only with HWSETA's written approval. The service provider may propose supplementary questions of up to five minutes.
- Make at least three call attempts per learner on different days and times (including an evening or Saturday) before a learners is classified as non-contact.

    - Trace unreachable learners using alternative methods such as, SMS, WhatsApp, e-mail and social media.

- 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.
- Perform quality assurance by back-checking at least 10% of completed interviews.
- Add a consent-to-contact question at the end of the questionnaire: "Would you be open to taking part in a short follow-up focus group discussion about your answers?" Only respondents who answer yes may be invited. Participants are selected at random from this group, balanced by gender, programme and province, and the selection is documented.

The proposal must set out how the service provider will maximise response and assess non-response bias.

3.4 Focus group discussions and key informant interviews

Conduct two focus group discussions (FGDs) with 6-8 respondents each from the survey to understand the "how" and "why" of the survey responses.

Table 4: FGD design

Stratum	FGDs	Purpose
A. **Unemployed** completers of learnerships and artisan programmes	1	Understand barriers to employment for occupationally qualified learners
B. **Unemployed** completers of graduate internships and bursaries	1	Understand barriers to employment for graduates
Total	**2**	

- HWSETA will provide focus group discussion guide and key informant interview questionnaires.
- All FGDs and interviews must be recorded with consent, transcribed (and translated into English where necessary), and analysed thematically using a coding framework submitted with the transcripts.

Key informant interviews: approximately four interviews with host employers and training providers, covering employers that did and did not absorb HWSETA learners, on absorption practices, the work-readiness of HWSETA learners and barriers to employing them.

3.5 Ethical considerations and data protection

Participation is voluntary and based on informed consent, recorded at the start of each interview and FGD, with separate consent for audio recording. Learners must be told that taking part has no effect on any future HWSETA funding. Individual answers must never be disclosed to host employers, training providers or anyone outside the study team, and personal identifiers must be kept separate from the analysis data. All personal information and data collection must be handled in compliance with the Protection of Personal Information Act (No. 4 of 2013): stored encrypted and access-controlled, used only for this study, and returned or destroyed at the end of the contract, with written confirmation, subject to the agreed audit and retention arrangements as outlined in the data management plan submitted with the proposal. 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. Pilot learners form part of the census; valid pilot interviews count as completed interviews 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.

3.6 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 programme, NQF level, gender, age, disability, province and learner 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 weighted.
- 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 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.

4. 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 5: 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)		
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

Criterion	Scoring	Points
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	Years of relevant experience on tracer studies or comparable survey assignments	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							
3							
4							
5							

Add rows as needed, up to ten projects.

5. TIMEFRAME AND DELIVERABLES

The study runs for approximately **four months**, from estimated February 2027 to May 2027.

Table 7: Deliverables

Phase	Deliverable	Format
Inception	**Inception report** (understanding of the assignment, data collection plan, contact protocol, FGD recruitment plan, quality assurance, risk plan, work plan) methodology, sampling design and weights; ethics and data protection plan; analysis plan; risk and mitigation plan; detailed work plan, data management plan (secure transfer, storage, retention, handover and deletion of learner data)	MS Word
	Scripted questionnaire, with a Word version	CATI script; MS Word
Data collection	**Survey fieldwork** with weekly progress reports; FGDs and interviews	MS Word / Excel
	Datasets (raw and cleaned) and codebook; **audio recordings**; **transcripts** and coding framework; **fieldwork technical report** (including the FGD selection record)	Excel / SPSS; MP3; MS Word
Data analysis and reporting	Draft report with disaggregated findings, with detailed limitations, analysis files and tables.	MS Word
	One virtual validation session with HWSETA; presentation and comments record	MS PowerPoint
	Final report (1/5/35), including conclusions and evidence-based recommendations; executive summary; final datasets and syntax; response matrix; presentation; 1–2-page **infographic**	MS Word; PDF; Excel / SPSS

6. ROLES, RESPONSIBILITIES AND CONTRACT MANAGEMENT

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. 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. Attend progress meetings at least every two weeks during fieldwork and as reasonably required at other stages.

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 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

7. PRICING

Prices must be **inclusive of VAT**, valid for 90 days, and submitted in the table below (additional detail may be attached). HWSETA may request a breakdown of rates and may negotiate the selection of deliverables in line with the contract price.

Table 6: Pricing schedule (all amounts inclusive of VAT)

Activity	Group	Number	Cost (R)
Inception report			
Scripting of the questionnaire			
Fieldworker training and pilot data collection			
Telephonic interviews (approx. 20 minutes)			
	Graduate internships	530	
	Learnerships	1,018	
	Artisan programmes	163	
	Bursaries	553	
	Total interviews	**2,264**	
Virtual focus group discussions, including transcription	Self-reported unemployed learners	2	
Virtual Key informant interviews, including transcription	Host employers/ training providers	4	
Data cleaning and submission; audio recordings			
Fieldwork technical report			
Analysis, draft and final report, and presentation			
TOTAL COST (incl. VAT)			

8. MANDATORY REQUIREMENTS

Proposals without all of the following will be disqualified:

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: CONSENT IN TERMS OF SECTION 11 OF THE PROTECTION OF PERSONAL INFORMATION ACT, 2013 (POPIA) - 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.

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]