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 and qualification attainment for unemployed individuals who completed the Work Integrated Learning Programme.

EOI particulars	Submission details
Title of the EOI	Track and Tracer Study of Unemployed Learners under the HWSETA-funded TVET and University Work-Integrated Learning Programmes – 2026/27
Date of this EOI	03/11/2026
EOI reference number	HWSETA-26/27 EvalResearch-0006
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-0006]"
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 UNDER THE HWSETA-FUNDED TVET AND UNIVERSITY WORK-INTEGRATED LEARNING (WIL) PROGRAMMES

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1. BACKGROUND AND PURPOSE

The Health and Welfare Sector Education and Training Authority (HWSETA) funds Work-Integrated Learning (WIL) placements that allow unemployed TVET college and university students to complete the workplace component required for their qualifications. TVET learners who have completed their N6 certificate studies are required to complete a mandatory 18 to 24-month practical training period in order to earn their National N Diploma. The National N Diploma is awarded by the Department of Higher Education and Training (DHET) only after the prescribed period of relevant workplace training. Similarly, the WIL programme links university students with employers, allowing them to earn work integrated learning hours and gain practical work experience to help them become work ready after graduation. WIL is therefore a key link between post-school education and employment, in line with the Skills Development Act (No. 97 of 1998), the National Skills Development Plan 2030 and the Workplace-Based Learning Policy Framework.

HWSETA's performance reporting shows that many learners complete their WIL placements, but a significant proportion do not go on to obtain their full qualification, particularly TVET learners. HWSETA also has limited reliable information on learners' qualification status, partly because records held by TVET colleges are incomplete. In addition, some TVET learners start a WIL placement but do not complete it, for reasons that are not well understood. This study will measure qualification attainment and will explain why learners do not complete their placements or their qualifications.

Completing a WIL placement does not, on its own, show that a learner went on to obtain the qualification, or that later employment was caused by the placement: certification processes, college administration, labour demand and learners' own circumstances also play a part. The study must therefore describe what happens to learners and explain the factors behind it, 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 and contributes to Annual Performance Plan indicator 10 and provides measurements for the mid-term review of the 2025–2030 Strategic Plan. It informs the following outcome indicators:

Table 1: Outcome indicators to be assessed

Outcome indicator	Description
3-12a	Number of unemployed persons who obtain their university qualifications after successfully completing university WIL programmes funded by the HWSETA by the end of the strategic period
3-12b	Number of unemployed persons who obtain their TVET college qualifications after successfully completing TVET college WIL programmes funded by the HWSETA 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 WIL Tracer study to assess qualification attainment upon completion of the WIL programme and if the qualifications led to absorption into the labour market.

2. OBJECTIVES AND STUDY QUESTIONS

The study must respond to the following objectives:

1. To determine the number and proportion of TVET and university WIL completers who have obtained their full qualification.
2. To understand why TVET learners who completed WIL have not obtained their qualification, and why some TVET learners do not complete their WIL placement.
3. To assess the quality and relevance of WIL placements, as experienced by learners.
4. To determine the employment and further-study outcomes of WIL completers, and the quality of the employment obtained.
5. To compare outcomes between TVET and university WIL, and draw lessons for programme design, host employer selection and institutional partnerships.

The study questions are organised by the group or pathway each learner belongs to, matching the routing of the HWSETA questionnaires. Each respondent is assigned to one group and one current pathway, and results are compared across groups and between TVET and university WIL.

Table 2: Study questions by group and pathway

Group or pathway	Study questions
1. All WIL completers: qualification attainment	a) How many and what proportion report having obtained their full qualification according to DHET records, by programme, institution, field of study, province, gender, age, disability and time since WIL? b) How long after WIL did they obtain it? c) For those who have not yet received their certificate, where in the certification process has it been delayed?
2. TVET completers without the qualification	a) What is outstanding (e.g. modules, logbook sign-off, certification processing, fees, college administration)? b) Do they intend to complete, and what would help them?
3. TVET non-completers	a) Why did they leave their WIL placement (e.g. placement quality, stipend, distance, personal circumstances, finding work)? b) What are they doing now, and what could HWSETA, colleges and host employers do differently?
4. Employed completers (absorbed by the host employer or employed elsewhere)	a) Were they absorbed by their host employer, or how did they find other work? b) In which sector and occupation do they work, on what contract, income and benefits, and how aligned is the work with their qualification?
5. Self-employed, studying or unemployed completers	a) Self-employed: what activity, and how did WIL contribute? Studying: what, at what level, and did WIL enable admission? b) Unemployed: how long have they been looking for work, by what methods, what barriers do they face, and what support would help?
6. Across all groups	a) How structured, relevant and well-supported were placements (mentor, learning plan, logbook, stipend paid on time), and how do learners rate their value? b) How do outcomes differ between TVET and university WIL, and why? c) What changes to WIL design, host employer selection and partnerships would improve completion and attainment?

3. SCOPE AND METHODOLOGY

3.1 Study population and methods

Table 3: Study population

Group	Approx. number
TVET WIL completers	487
TVET WIL non-completers	100
University WIL completers	687
Total survey population	**1,274**

The service provider is required to,

- Track and trace **1,174** learners that have completed HWSETA-funded TVET and University WIL programmes. Utilise census sampling approach to conduct telephonic interviews using Computer Assisted Telephonic Interviews (CATI).
- Administer online survey to **100** TVET WIL non-completers;
- Conduct **one** virtual focus group discussion with TVET WIL non-completers, comprised of at least 6-8 participants;
- Conduct **one** virtual key informant interviews with TVET WIL co-ordinator at DHET to enrich the survey findings.

3.3 Survey

HWSETA will provide two questionnaires: for TVET and University WIL completers (approximately 20 minutes) and a shorter questionnaire for TVET non-completers (Approximately 10 minutes). The service provider is required to,

- Review and script two questionnaires as issued, with routing logic. Corrections arising from the pilot take effect only with HWSETA's written approval. The service provider may propose a supplementary module of up to five minutes for the completers' questionnaires.
- Make at least three call attempts per learner on different days and times (including an evening or Saturday) before classifying a non-contact.
- Tracing of unreachable learners by SMS, WhatsApp, e-mail and social media.
- 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 groups and key informant interviews

Conduct one focus group discussion (FGD) with 6–8 TVET WIL non-completers to understand the "how" and "why" of the survey responses.

Table 4: FGD design

Stratum	FGDs	Purpose
TVET WIL non-completers	1	Understand why learners leave their placements

- 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: One interview with a DHET official (e.g., examinations and certification; the TVET branch responsible for TVET WIL).

3.5 Ethics 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. FUNCTIONALITY/COMPETENCE EVALUATION

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
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)		

Criterion	Scoring	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 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 will contact referees: a letter is invalid if the referee does not respond within five working days or does not confirm it.

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 February 2027 to May 2027. The due dates are firm, subject to HWSETA meeting its review times (Section 6).

Table 6: 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 questionnaires (two), with Word versions	CATI scripts; MS Word

Phase	Deliverable	Format
	Training and pilot report, with revised tools	MS Word
Data collection	**Survey fieldwork** with weekly progress reports; FGDs and interviews	MS Word / Excel
	Datasets (raw and cleaned, merged with DHET records), codebook and mapping table; **audio recordings**; **transcripts** and coding framework; **fieldwork technical report** (including the FGD selection record)	Excel / SPSS; MP3; MS Word
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

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 7: Pricing schedule (all amounts inclusive of VAT)

Activity	Group	Number	Cost (R)
Inception report			
Scripting of two questionnaires			
Fieldworker training and piloting			
Telephonic interviews			
Completers (approx. 20 minutes)	TVET WIL	487	
	University WIL	687	
Non-completers (approx. 10 minutes)	TVET WIL	100	
Focus group discussions, including transcription	TVET	1	
Key informant interviews, including transcription	DHET	1	
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)

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]