

**Terms of reference (ToRs) for the procurement of services below the EU threshold**

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<p>Recruitment of the Gender Responsive Budgeting Experts to assist in developing and piloting a <b>training module on Gender-Responsive Planning, Budgeting, Monitoring, Evaluating and Auditing (GRPBMEA)</b> for all levels of Public Finance Management in government.</p>	<p><b>Project number/ cost centre:</b> <b>17.2088.7-005.00</b></p>
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**0. List of abbreviations**

AG	Commissioning party
AN	Contractor
GTCC	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

## 1. Context

The purpose of the Terms of Reference (ToR) is to recruit gender responsive budgeting experts to assist in developing and piloting a **training module on Gender-Responsive Planning, Budgeting, Monitoring, Evaluating and Auditing (GRPBMEA)** for all levels of Public Finance Management in government. The training project is led by the National Treasury in collaboration with the Department with Women, Youth and Persons with Disabilities, funded by the Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and implemented through the Collaborative Africa Budget Reform Initiative (CABRI). The tender is open to gender responsive budgeting expert contractors and non-profit or non-governmental organizations in this field. South Africa recognizes gender equality as vital for sustainable and inclusive development. The country has signed several international and regional agreements that commit to promoting gender equality. Gender equality is enshrined in the Constitution and there are several frameworks in place that inform policies and programmes such as the Framework for Transforming Gender Relations; the National Policy Framework for Women's Empowerment and Gender Equality; and more recently, the Framework on GRPBMEAF.

Preliminary results from a recent study on advancing the implementation of Gender-Responsive Budgeting found that the budget process in South Africa is not gender responsive<sup>1</sup>. The study noted that the PFM system could be made gender responsive by leveraging existing budgeting and reporting tools and instruments. Given that related reforms are socially and politically sensitive, the study recommended a sequenced and agile approach based on pilots and leveraging of existing experiences and practices. An integrated framework for Gender-Responsive Budgeting was therefore proposed, that will identify key entry points for the inclusion of gender across the full budget cycle. The study also proposed the developed of a roadmap which provides recommendations for a phased approach for the introduction of Gender Responsive Planning, Budgeting, Monitoring, Evaluating and Auditing (GRPBMEA) covering key stages of the budget cycle.

Strongly identified, was the need for sensitization on gender mainstreaming and capacity building in GRPBMEA, which will pave the way and help create an enabling environment for related reforms. Current training programmes conducted by the National School of Government's (NSG) have been assessed as being inadequate to meet the needs of technical staff on gender mainstreaming in Public Finance Management. The objective of the project is therefore to address this capacity gap by supporting the National Treasury of South Africa with developing and piloting a **training module on Gender Responsive Planning, Budgeting, Monitoring, Evaluating and Auditing (GRPBMEA)**. This is in line with the short to medium - term capacity building recommendations in the Gender Responsive Implementation Roadmap<sup>2</sup>.

The training module will be designed for officials working in Public Finance, budget managers, programme managers, project managers and those involved in planning, monitoring and evaluation and auditing at national, provincial and local government. It will be piloted with the

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<sup>1</sup> National Treasury of South Africa (forthcoming) Advancing Implementation of Gender Responsive Budgeting in South Africa, Pretoria.

<sup>2</sup> National Treasury of South Africa (forthcoming) Advancing Implementation of Gender Responsive Budgeting in South Africa, Pretoria.

National Treasury, Provincial Treasuries, selected government departments and municipalities. A training of the trainer component will be included for South African consultants working in Public Finance Management and/or gender mainstreaming with the objective to strengthen capacity and knowledge in this area.

Addressing gender inequality is important as women in South Africa continue to be disproportionately affected by poverty and unemployment, with Covid-19 exacerbating these existing inequalities. Women are in addition, underrepresented both economically and politically. The adoption of Gender-Responsive Budgeting and the empowerment of both women and men in key public finance roles will improve governance and help to reduce existing inequalities, enabling the country to meet its national development goals and achieve the Sustainable Development Goals (SDGs)<sup>3</sup>. The training model should be participatory and citizens based.

## **2. Tasks to be performed by the contractor**

The contractor will assist in developing and piloting the training program on Gender-Responsive Planning, Budgeting, Monitoring, Evaluating and Auditing. An adaptive approach is required so that training meets the required needs as the reform agenda progresses. Early training, which is the focus of this terms of reference, will focus on sensitization and capacity building on Gender-Responsive Budgeting in general, while follow-on training will be more focused on the functionality and application of tools introduced to support related forms. The training module will complement and build on current training provided by the National School of Government (NSG). The training module will aim to:

- Develop capacity of officials working in all aspects of Public Finance, budget managers, programme managers, project managers and those involved in planning, monitoring and evaluation and auditing at the national, provincial and local government;
- Increase awareness and understanding of the importance of Gender-Responsive Budgeting for sustainable and inclusive development;
- Provide an overview of identified entry points for gender in the national planning and budgeting process in South Africa;
- Provide insight into Gender-Responsive Budgeting reforms that have progressively been introduced across the continent and beyond over the last two decades, drawing on country experiences from Morocco, Cote d'Ivoire, Cape Verde, Rwanda, Uganda, Australia, Bangladesh, India, etc.;
- Provide an overview of the practical tools that can be applied for Gender-Responsive Budgeting; and
- Address gender equality in the workplace, with a focus on empowering women and men in the public sector.

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<sup>3</sup> SDG 5 refers explicitly to gender equality and women empowerment; however, gender equality is key to achieving the other SDGs.

**The Team Leader is responsible for providing the following services:**

1. Course concept/inception report - a detailed course concept for the blended training, indicating the learning content, the learning matrix and delivery mode. It should also include key timelines for completion which will be approved by the Steering Committee.
2. Online and in-person learner guides
3. Facilitator guide with model responses
4. Resources such as research papers, policy documents, audio-visual learning support, case studies and scenarios amongst others
5. Facilitator preparation guide
6. The delivery of two in-person facilitator orientation workshops in South Africa
7. The delivery of 8 pilot in-person training workshops in South Africa with identified participants
8. Corrections to the materials based on the pilot and facilitator orientation sessions
9. Professional editing, and
10. Provide recommendations following the piloting of the proposed training module for future Gender-Responsive Budgeting training.

**The Gender Responsive Planning, Budgeting, Monitoring, Evaluating and Auditing (GRPBMEA) expert is responsible for:**

- Conducting research, baseline studies and initial analysis for the review of the key strategic policy documents, regulations framing the planning and budgeting processes at national and local government with a gender perspective;
- Support to the project team and partners on the technicalities of GRPBMEA training;
- Develop content for the training module and facilitator orientation guides;
- Support the online migration of the content, knowledge materials/products and assessment tools;
- Support the online component of the training;
- Delivery of the facilitator orientation workshops and pilot training workshops.

**The contractor/s are expected to perform the following tasks:**

Certain milestones, as laid out in the table below, are to be achieved by certain dates during the contract term, and at particular locations:

<b>Milestones/process steps/partial services</b>	<b>Deadline/place/person responsible</b>
Inception report on blended training plan and workshops (provides an overview of the content to be included in the blended training module, including country examples and the timeline for completion)	July 2023 / virtual / team leader and GRPBMEA expert
Online and in-person learner guides	By Sept 2023 / virtual / team leader and GRPBMEA expert
Online and in-person training content on gender responsive budgeting	By Sept 2023 / virtual / team leader and GRPBMEA expert

Facilitator guide with model responses	By Sept 2023 / virtual / team leader and GRPBMEA expert
Facilitator preparation guide	By Sept 2023 / virtual / team leader and GRPBMEA expert
Resources such as research papers, policy documents, audio-visual learning support, case studies and scenarios amongst others.	By Sept 2023 / virtual / team leader and GRPBMEA expert
Revised training module following feedback from the Steering Committee	By October 2023 / virtual / team leader and GRPBMEA expert
Professional editing	By October 2023 / virtual / team leader and GRPBMEA expert
Assist with migration of training material to the online platform	By November 2023 / virtual / team leader and GRPBMEA expert
Delivery of facilitator orientation workshops	By November 2023 / Pretoria / team leader and GRPBMEA expert
Delivery of pilot training workshops	By End of November 2023 / Pretoria / team leader and GRPBMEA expert
Revisions to training module following piloting	By Beginning of December 2023 / virtual / team leader and GRPBMEA expert
Report on pilot training workshops and recommendations for future Gender-Responsive Training	By Mid January 2024 / virtual / team leader and GRPBMEA expert

The consultant(s) will be responsible for all the deliverables outlined in the table above.

**Period of assignment:** From 17 July 2023 until 31 January 2024.

### 3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

#### Technical-methodological concept

**Strategy (1.1):** The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to present and explain its approach to **steering** the measures with the project partners (1.3.1) and its contribution to the **results-based monitoring system** (1.3.2).

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) and GIZ and to promote scaling-up effects (1.5.2) under **learning and innovation**.

### **Project management of the contractor (1.6)**

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

- The contractor is responsible for selecting, preparing, training and steering the experts (international and national, short and long term) assigned to perform the advisory tasks.
- The contractor makes available equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.

The contractor reports regularly to GIZ in accordance with the GTCC of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH from 2018

In derogation from GIZ GTCC, the contractor makes contributions to reports to GIZ's commissioning party instead of submitting its own reports.

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

### **Further requirements (1.7)**

Resources involved in the project must have knowledge and understanding of the evolution of Public Finance Management Reforms in South Africa at all 3 spheres of government (National, Provincial and Local governments) and complexities of gender inequality.

#### 4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 6), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

##### **Team leader**

###### Tasks of the team leader

- Lead the development of the content for the blended training module. This includes research on gender responsive budgeting, design the blended training module and develop related guides and learning material
- Develop the facilitator guide
- Provide support to the online component of the training
- Revise the training material following feedback from the steering committee
- Lead the delivery of the facilitator orientation workshops
- Lead the delivery of 8 in-person pilot training workshops
- Revise the training material following lessons from piloting the training
- Develop a report on the pilot training workshops and recommendations for future Gender-Responsive training
- Attend regular meetings with the Steering Committee

###### Qualifications of the team leader

- Education/training (2.1.1): Post graduate university qualification in Public Finance Management, Economics, Gender and Development or the Social Sciences. Additional qualification/training in Gender-Responsive Budgeting will be an advantage.
- Language (2.1.2): Good business language skills in English is essential. Knowledge of other languages such as French or Portuguese would be desirable although not a requirement for this position.
- General professional experience (2.1.3): 10 years of professional experience in Public Finance Management or Gender Relations. Proven knowledge and experience in Gender-Responsive Budgeting, content development for training in Gender Responsive Budgeting, conducting gender analysis and reporting on gender related matters. Knowledge and experience of South African Public Finance Management and operations would be desirable.
- Specific professional experience (2.1.4): 10 years of experience with developing and delivering training to professionals. Experience working with government agencies would be an advantage.
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company or government institution.
- Regional experience (2.1.6): 3 years of experience with projects in Africa, of which 2 years must be in South Africa.
- Development Cooperation (DC) experience (2.1.7): N/A
- Other (2.1.8): N/A



## **Key expert 1: Gender Responsive Planning, Budgeting, Monitoring, Evaluating and Auditing (GRPBMEA)**

### Tasks of key expert 1

Work with the team leader to develop and deliver the blended training module. This includes,

- research on gender responsive budgeting,
- design the blended training module and develop related guides and learning material
- Provide support to the online component of the training
- Develop the facilitator guide
- Revise the training material following feedback from the Steering Committee
- Deliver two facilitator orientation workshops
- Deliver 8 in-person pilot training workshops
- Revise the training material following lessons from piloting the training
- Develop a report on the pilot training workshops and recommendations for future Gender-Responsive training
- Attend regular meetings with the Steering Committee

### Qualifications of key expert 1

- Education/training (2.2.1): Post graduate university qualification in, Development studies, Public Finance Management or Economics. Additional qualification/training in Gender-Responsive Budgeting.
- Language (2.2.2): Good business language skills in English is essential. Knowledge of other languages such as French or Portuguese would be desirable although not a requirement for this position
- General professional experience (2.2.3): 5 years of demonstrated experience with gender mainstreaming in policies and budgets. Proven knowledge and experience in Gender Responsive Budgeting, developing a training module/material in Gender Responsive Budgeting, conducting gender analysis and reporting on gender related matters.
- Knowledge and experience of South African Public Finance Management and operations would be desirable.
- At least 5 years of previous experience working/consulting for international projects/programmes.
- Specific professional experience (2.2.4): 5 years of experience with developing and delivering training to professionals. Experience working with government agencies would be an advantage.
- Leadership/management experience (2.2.5): 5 years of management/leadership experience as project team leader or manager in a company or government institution.
- Regional experience (2.2.6): 3 years of experience with projects in Africa, of which 2 years must be in South Africa.
- Development Cooperation (DC) experience (2.2.7): N/A
- Other (2.2.8): N/A

### Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Team skills
- Initiative

- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

## **5. Costing requirements**

### **Assignment of personnel and travel expenses**

Per-diem and overnight accommodation allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable at <https://www.bundesfinanzministerium.de>).

Accommodation costs which exceed this up to a reasonable amount and the cost of flights and other main forms of transport can be reimbursed against evidence

All business travel must be agreed in advance by the officer responsible for the project.

### **Sustainability aspects for travel**

GIZ would like to reduce greenhouse gas emissions (CO<sub>2</sub> emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO<sub>2</sub> efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

If they cannot be avoided, CO<sub>2</sub> emissions caused by air travel should be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance \(German only\)](#) has published a [list of standards \(German only\)](#). GIZ recommends using the standards specified there.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of TL/key expert/short-term expert pool	2	55	110	The bidder will decide upon the allocation of days per expert
Travel expenses	Quantity	Price	Total	Comments
Per-diem allowance in country of assignment	40			The bidder will decide upon the allocation of days per expert
Overnight allowance in country of assignment	40			The bidder will decide upon the allocation of days per expert
Transport	Quantity	Price	Total	Comments
International flights	4			Travel to the place of service delivery (South Africa - Pretoria)
Domestic flights	8			Flights within the country of assignment during service delivery (Eastern Cape, KwaZulu-Natal, Western Cape, Limpopo, Mpumalanga)
CO <sub>2</sub> compensation for air travel				A budget is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) <ul style="list-style-type: none"> <li>• car</li> <li>•</li> </ul>				Travel within the country of assignment, transfer to/from airport etc.
Other travel expenses <i>Visa</i>	1			visa costs
Other costs	Number	Price	Total	Comments
Other costs				

## 6. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English (language).

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

## 7. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to [ZA\\_Quotation@giz.de](mailto:ZA_Quotation@giz.de) no later than **19<sup>th</sup> May 2023** all documents must be in PDF.
- Submission to any other email address may invalidate your bid.
- Please do not mention any price for this measure on your cover letter/Technical proposal.
- Please submit your tax clearance certificate with the bidding documents.
- Please submit your price proposal in **Euro**.
- Our General Terms of Conditions (attached) shall not be changed/amended should you be the winner of this tender. These General Terms and Conditions will form part of the contract should you be awarded this contract. By submitting your proposal, we will conclude that you have read and accepted these terms and conditions.
- Participating more than once in same tender is not allowed and it will lead to your proposal as well as that of the company where you appear more than once being disqualified. The responsibility rests with the companies to ensure that their partners/experts are not bidding/participating more than once in same tender.
- **Bidders are not allowed to communicate directly with any other person regarding this bid other than the procurement official/s. Failure to comply with this requirement may lead to your bid being disqualified.**
- Bidders must strictly avoid conflicts with other assignments or their own interests. Bidders found to have a conflict of interest shall be disqualified. Without limitation

on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this EOI and tender process, if they:

- a) are or have been associated in the past, with a firm or any of its affiliates which have been engaged by GIZ or the Interim Supply Chain Management Council to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the services in this selection process;
- b) were involved in the preparation and/or design of the programme/project related to the services requested under this EOI and tender;
- c) are serving or have been serving in the past three months in the structures of the Interim Supply Chain Management; or
- d) are found to be in conflict for any other reason, as may be established by, or at the discretion of GIZ.

#### Scientific data

In the event of any uncertainty in the interpretation of a potential conflict of interest, Bidders must disclose to GIZ, and seek GIZ's confirmation on whether or not such a conflict exists.

- Similarly, the Bidders must disclose in their proposal their knowledge of the following:
  - a) if the owners, part-owners, officers, directors, controlling shareholders, of the bidding entity or key personnel are family members of GIZ staff involved in the procurement functions and/or the Interim SCM Council or any Implementing partner receiving services under this EOI or tender; and
  - b) all other circumstances that could potentially lead to actual or perceived conflict of interest, collusion or unfair competition practices.
- **Failure to disclose such an information may result in the rejection of the proposal or proposals affected by the non-disclosure.**
- **Bids sent via Dropbox and WeTransfer will not be accepted.**