

Development and implementation of Phase Assessments as well as Integrated Summative Assessment (IISA) for occupational Training programmes (CoS and DSPP)

**Project number/
cost centre:**

16.2215.8-001.00

0. List of abbreviations

AHK	Aussenhandelskammer
AV	Auftragsverantwortliche
BMZ	Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung/Federal Ministry for Economic Cooperation and Development
COS	Centres of Specialization Programme of the Department of Higher Education and Training (DHET)
DHET	Department of Higher Education and Training
DSPP	Dual System Pilot Project
DV	Durchführungsverantwortliche
ECA(SA)	Electrical Contractors' Association of South Africa
EISA	External Integrated Summative Assessment
IISA	Internal Integrated Summative Assessment
GIZ	Gesellschaft für Internationale Zusammenarbeit
IOPSA	Institute of Plumbing of South Africa
KM	Knowledge Management
M&E	Monitoring and Evaluation
NSF	National Skills Fund
OECD	Organisation for Economic Co-operation and Development
OTC	Occupational Team Conveners under the COS Programme
PD	Person Days
QCTO	Quality Council for Trades & Occupations
RMI	Retail Motor Industry
SSACI	Swiss South Africa Cooperation Initiative
SAIW	South African Institute of Welding
SD4GE	Skills Development for a Green Economy (phase 1)
SD4GE II	Skills Development for a Green Economy II (phase 2)
SEIFSA	Steel and Engineering Industry Federation of South Arica
STE	Short Term Expert

ToR	Terms of Reference
TVET	Technical Vocational Education and Training
VET/HRD	Vocational Education and Training /Human Resource Development
WP	Work Package

Terms of reference (ToR) for the procurement of services up to the value of EUR 200,000



1. General information

a. Brief information on the project

The overarching goal of German Development Cooperation in the priority area of “TVET and Skills Development” is that “The quality of TVET and skills development in South Africa is improved with regard to its labour market relevance.” The Skills Development for a Green Economy Programme II (SD4GE II) supports a structural change towards more employment-oriented dual Technical Vocational Education and Training (TVET) approaches in South Africa. The SD4GE II programme aims to improve the cooperation between actors from (T)VET institutions and the private sector in dual training measures. This includes:

- The practice-orientated further training of TVET personnel (TVET College lecturers and TVET college management). In this context international and national institutional linkages are strengthened.
- **Building blocks for the development of artisans of the 21st century:** Support to the implementation of the South African Dual System Pilot Project (DSPP) and its transfer under the Centres of Specialization programmes (CoS) as a regular delivery mechanism for new occupational programmes. This includes **21st century assessment processes**, curriculum content, quality assurance, and learning support materials, amongst others.
- Cooperation between public and private sector actors to support VET (dual training, demand-side oriented, flexible short-term qualifications, career path development, in-company mentor training) for employment.

The objective of SD4GE II is to strengthen a sustainable basis for cooperative vocational education & training in South Africa and to contribute to the development of dual training models involving actors from both the private sector and the public TVET sector.

On the German side, SD4GE II is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). To achieve this, GIZ collaborates with its national political partner, the Department of Higher Education and Training (DHET) as well as with the National Skills Fund (NSF). The programme, which is scheduled for a period of 4 years (April 2018 – March 2022) aims to create a sustainable basis for cooperation between public stakeholders and industry stakeholders (e.g. lead employers, host employers, colleges and professional bodies/associations etc.) for supporting the development of employment-oriented vocational education and training in South Africa.

b. Context

TVET remains one of the apex priorities of post-school education and training in South Africa, with much focus on supporting TVET Colleges to offer relevant and responsive training curricula aimed at the development of skills which produce employable young people and that will result in them addressing the articulated need for artisans in the country. A June 2020 paper by Stephanie Allais and Carmel Marock (Centre for Researching Education and Labour University of the Witwatersrand), highlights a wide array of weaknesses in the TVET sector, yet despite these, “TVET is still looked to for solving labour market crises—and the language

of urgency, immediacy, and agility is being used by key stakeholders and role-player's in this regard. TVET is still looked upon as key to teaching new skills, which may be required in a changing economy, as well as to 'reskill' the many who have lost their jobs or will lose them in the months to come as a result of Covid-19". Experience across the board, however, indicates that substantial investment in TVET and skills development programmes does not always translate into qualifications and/or jobs. The reasons for this are multi-faceted, but can also be linked to how learning and skills are assessed which is especially relevant for the new occupational trades, where the showcase of integrated knowledge, understanding and application is acutely important in assessments.

Several studies indicate that the South African artisan ecosystem is often flooded with poor quality, part qualified or at worst unqualified persons (passed through an assessment process) when what Industry requires is good quality, well qualified artisans, well able to integrate to the world of work. Furthermore, the pervasive nature of technology advancement, indicates an exponential increase in the demand for innovation linked to future skills demands, including digital skills, especially amongst youth – this was acutely acknowledged and felt during the Covid 19 lockdown phase. It has become increasingly imperative that education curricula, implementation of teaching, as well as conducting of assessments takes cognizance of and integrates these employability skills, linked not only to current workplace demands, but also future trends. Much research has confirmed the value of work readiness training, beyond technical competences, must include functional competence linked to soft skills, increasingly focused on problem solving to enable youth from especially poor households to more successfully transition to the world of work. This significantly implies that how assessment happens should take cognizance of these requirements and be increasingly aligned to assessing the work readiness of apprentices linked to 21st century work requirements.

c. Current developments and challenges

In 2018, the SD4GE project supported the setting up of an Assessment Task Team – a multistakeholder team comprised of team members from relevant branches of the DHET (TVET and Skills Branch), the QCTO together with Industry Association (Electrical and Plumbing) stakeholders as part of the DSPP support process to DHET. The main objective of the task team was to reflect on how to improve the current assessment processes to be more aligned to the needs and requirements of 21st century work contexts.

A decision taken by this Task Team in May 2019 led to the development of an A21 Proficiency test for the first cohort of 80 DSPP Electrical Trade apprentices in their final year and entailed an actual, real-life problem being presented to the apprentices. The assessment also included a wide range of "soft skills" being observed during this real-life exercise, and the design team also sought to unearth business/entrepreneurial skills (such as drawing up budgets, invoices, dealing with suppliers), creative thinking skills (as the solutions to the problems posed were multi-dimensional), teamwork- and leadership. The process clearly showed that a combination of a real scenario and digital methodologies could be applied not only for assessment purposes, but also as a training approach within the vocational field. At approximately the same time, the DSPP apprentices participated in the External Integrated Summative Assessment (EISA) and the significantly poor results of this process led to several stakeholders, including

the task team, reflecting on how to address this and better prepare apprentices for undertaking the trade test.

One of the decisions taken was to introduce phase assessments for apprentices enrolled in the CoS (and DSPP) projects. As CoS project manager SSACI brought some members of the Assessment Task Team together to reflect on a methodology for the development of phase assessments. This resulted in phase 1 (year 1) assessments being developed for the following trades:

- Plumber,
- Electrician,
- Mechanical Fitter,
- Fitter and Turner,
- Automotive Mechanic and
- Diesel Mechanic.

However, due to the Covid-19 developments and related lockdown regulations, this process, as well as the plan to develop phase assessments for the remaining 7 CoS trades:

- Bricklayer,
- Carpenter,
- Pipe Fitter,
- Rigger,
- Welder,
- Boilermaker and
- Millwright,

including phase assessments for year 2 and 3 for all 13 COS trades was stalled. Although attempts were made to continue work remotely, this was not fully possible and as such the training of lectures to develop and implement phase assessments was not completed. Additionally, there is a requirement to develop 21st century, robust, Internal Integrated Summative Assessment (IISA) to assist apprentices prepare and be ready for undertaking the final trade test (EISA). These two elements are the subject matter for these Terms of Reference.

2. Interventions to be undertaken by the contractor

The objective of this tender is to manage a process to strengthen the quality, relevance and implementation of an integrated, project-based (situational learning-based) assessment process that incorporates theory, practise and workplace-based experience as per NOCC A-21 for occupational programmes. This includes the DSPP and CoS projects, facilitators and lecturers as well as the development of both: phase assessments for the 13 trades and development of an exemplary IISA for the two trades Electrical and Plumbing.

This includes:

- (i) **management of the development and implementation of phase assessments for 13 CoS Trade for years, 1, 2 and 3;**
- (ii) **building and strengthening the capacities of facilitators and lecturers to develop phase assessments;**
- (iii) **implementation of phase assessments, sharing and documentation of implementation experience including lessons learnt;**
- (iv) **the development of an exemplary IISA that takes cognisance of and integrates modern technology including digital transformation in the two trades: Electrical and Plumbing (this is the 3rd assessment)**
- (v) **implementation of the IISA with at least 1 cohort each of Plumbing and Electrical apprentices.**

The approach in supporting the management as well as the development and implementation of these activities should include cooperation and engagement of both DHET and relevant Industry stakeholders. This should specifically be targeted at shifting the way assessments take place, include lessons and insights from international perspectives to enable greater alignment with real contexts entailing problem solving, precision, and thus employment orientation.

Period of assignment: from 11.01.2021 until 28.02. 2022.

The contractor contributes to the following two output areas of SD4GE (see results model in the annex):

- The organisation of dual training approaches has improved.
- The capacities of TVET personnel to plan and implement dual training has been strengthened.

All interventions should include the following integral elements:

- Development, implementation and documentation of several examples of phase-assessments in the different trades, including the assessment rubrics.
- Workshops to share implementation experiences and to document lessons learnt.
- Development of guidelines on how lessons emerging can assist to modernise current EISA implementation in the 13 trades.
- Development, implementation and documentation of an IISA using the Electrician and Plumber trades as case study examples.
- Development of communication and PR tools linked to implementation experiences in all intervention areas.

Work packages:

WP-1: Managing the development and implementation of phase assessments for 13 CoS Trade for years, 1, 2 and 3 (year 3 is an integrated assessment).

Project manage the development and implementation of phase assessments for 13 CoS Trade for year 1, 2 and 3, these being:

- electrician,
- plumber,
- automotive mechanic,
- diesel mechanic,
- fitter and turner,
- mechanical fitter,
- carpenter,
- rigger,
- boilermaker,
- welder,
- bricklayer,
- millwright and
- pipefitter.

These phase assessments should be developed with input from relevant industry stakeholders as well as NAMB, Indlela. QCTO – all who are members of the current Task Team on assessments, with a direct reporting jointly to relevant DHET and the GIZ's SD4GE team members. It would be important to outline how this process will be implemented.

It is expected that an on-boarding meeting with the selected service provider to confirm understanding of the assignment and expectation of deliverables is part of this work

package. This includes having a good understanding of the process thus far by engaging with key reports on the current status as well stakeholders involved including the CoS managers as well as key persons within SSACI as the previous manager of this phase assessment development process. It is critical to understand that is of critical importance that the assessments developed are project- based, integrating theory, practise and workplace-based experience as per objectives outlined in the NOCC A-21.

Deliverables:

- An on-boarding report that includes a status quo outline of current progress and agreement on priorities set.
- Stakeholder engagement to agree on a way forward.
- An implementation plan for completion of year 2 and 3 (year 3 is an integrated assessment) for the first 6 trades: (Plumber, Electrician, Mechanical Fitter, Fitter and Turner, Automotive Mechanic and Diesel Mechanic) and year 1,2,3 (year 3 is an integrated assessment), for the final 7 trades (Bricklayer; Carpenter; Pipe Fitter; Rigger; Welder; Boilermaker and Millwright).
- A proposal for the transfer of lessons learned and insights gained to the EISA process.

WP-2: Building and strengthening the capacities of facilitators and lectures to develop phase assessments

Train facilitators and lecturers to develop and implement phase assessments for 13 CoS Trade for year 1, 2 and 3(year 3 is an integrated assessment), these being: electrician; plumber; automotive mechanic; diesel mechanic; fitter and turner, mechanical fitter, carpenter, rigger, boilermaker, welder, bricklayer, millwright and pipefitter.

Further train facilitators and lecturers to be able to adapt the phase assessments to the local needs of their training facility and local industry. Also enable them to develop their own phase assessments in the future. So, they can develop these for other trades as well.

It would be critical for the facilitators and lecturers to have a good understanding of the process thus far by engaging with stakeholders (regional/ local companies) involved including the Industry stakeholders – especially companies hosting apprentices. Additionally, facilitators and lecturers should have a good understanding of how phase assessments can assist to prepare apprentices for participating in the EISA through assessing problem-based competencies, integrating theory, practise and workplace-based experience as per NOCC A-21.

Deliverables:

- Copies of phase tests developed as well as assessment guidelines
- Training report outlining key insights of process

WP-3: Implementation of phase assessments, sharing and documentation of implementation experience including lessons learnt

Facilitators and lecturers implement the phase assessments for 13 CoS Trades for year 1, 2 and 3, (these being: electrician; plumber; automotive mechanic; diesel mechanic; fitter and turner, mechanical fitter, carpenter, rigger, boilermaker, welder, bricklayer, millwright and pipefitter).

Coaching and assessment of how facilitators and lecturers implement the phase assessments, involve OTC's where possible and assist facilitators and lecturers to resolve challenges experienced. Evaluate the process and the outcome of the phase assessments together with facilitators and lecturers. Manifest their understanding of the link between the phase assessments, the IISA and the EISA.

Enhance and refine phase assessments developed through processes/events where facilitators and lectures share lessons learnt and insights gained in implementation phase assessments in different contexts. Involve and include Industry stakeholders as well as other relevant CoS stakeholders in these lesson sharing events.

Develop communication outlining the process and indicating lessons learned.

Deliverables:

- Assessment rubric for undertaking of the phase assessment
- All phase assessment implemented.
- Documentation of key lessons and insights gained from phase assessment implementation experience.
- Integration of lessons learned in refined versions of phase assessments
- Communication products.
- Distribution of findings among the facilitators and lecturers and CoS managers involved.

WP-4: Development of an exemplary IISA that takes cognisance of and integrates modern technology including digital transformation in two trades, Electrical and Plumbing

Take stock of insights and lessons emerging from the implementation of the first Trade Test for Occupational Programmes – the Electrician Trade Test (EISA) undertaken in 2019. Take cognisance of and utilize lessons learned to develop an Internal Integrated Summative Assessment (combining knowledge gathered over the 3-year apprenticeship) that integrates theory, practise and workplace-based experience. Use these insights to develop a guideline and criteria for undertaking the IISA (at 3rd year of apprenticeship) ensuring that it takes cognisance of and integrates modern technology including digital transformation. Implement this IISA in the two trades Electrical and Plumbing and in so doing also prepare them for the final EISA.

Make recommendations of how lessons and insights gained from such a new IISA could inform and enhance the current EISA.

Deliverables:

- Guidelines and criteria for undertaking of Integrated Summative Assessments
- An exemplary IISA for the Electrician and Plumbing trades developed.
- An assessment rubric developed.
- Presentation of the IISAs (Electrician and Plumbing) to all Cos Facilitators and DSPP lectures.

WP-5: Implementation of the integrated summative assessment with at least 1 cohort each of Plumbing and Electrical apprentices

Based on the findings from WP-4 and the subsequent integrated internal summative assessment developed put together a small inter-disciplinary assessment team (facilitators, lecturers, industry representatives, QCTO, NAMB and Indlela stakeholders, CoS, etc) to participate in and observe the implementation of the IISAs

with apprentices from the electrician and plumber trades utilizing the assessment rubric developed.

Evaluate the process and the outcome of the IISAs together with facilitators, lecturers and Industry stakeholders and note insights and relevance to real work context and link to preparing apprentices for EISA.

Document and develop communication material to share lessons learned with different stakeholders including all CoS facilitators and reflect on how this can inform and enhance the EISA.

Deliverables:

- Inter-disciplinary team set up to participate in and observe the implementation of the IISA.
- Assessment of apprentices undertaking the IISA, project-based assessments that integrate theory, practise and workplace-based experience as per NOCC A-21.
- Report documenting the process as well as lessons learnt.
- Recommendations to promote better collaboration between private and public actors for assessment processes indicating how this can contribute to a 21st century aligned EISA.
- Communication products.
- Distribution of findings to relevant stakeholders identified by the assessment task team, including critical CoS stakeholders.

Reporting

On the one hand, this serves the documentation and traceability of the performance of services. On the other hand, the tracking of progress in interventions in order to quickly respond to changes where necessary.

Furthermore, a final reporting is required including the integration of work package findings:

Deliverables:

- Quarterly interim progress reports.
- Final report that should include the following:
 - Integration of all 5 work package chapters.
 - Recommendations regarding way forward to promote collaboration between private and public actors for assessment processes and how this can contribute to a 21st century aligned EISA.
- All original raw data must be submitted to GIZ SD4GE II and DHET CoS.
- Presentation, discussion, and engagement to/with a broader stakeholder group.

Timelines:

- Onboarding report: 20.01.2021
- Quarterly reports: 31.03.2021 / 30.06.2021 / 30.09.2021
- Draft version of the final report: 31.01.2022
- Final version of the final report: 15. 02.2022

Milestones to be achieved by certain dates during the contract term

Milestone	Deadline/place/person responsible
Work package 1	
An on-boarding report that includes a status quo outline of current progress and agreement on priorities set	January 2021
Stakeholder engagement to agree on a way forward	January 2021
An implementation plan for completion of year 2 and 3 or the first 6 trades (Plumber, Electrician, Mechanical Fitter, Fitter and Turner, Automotive Mechanic and Diesel Mechanic) and year 1,2,3, for the final 7 trades (Bricklayer; Carpenter; Pipe Fitter; Rigger; Welder; Boilermaker and Millwright).	February 2021
A proposal for the transfer of lessons learned and insights gained to the EISA process.	February 2021
Work Package 2	
Copies of phase tests developed	June 2021
Training report outlining key insights of process	June 2021
Outline of workplan for implementation of phase assessments	June 2021
Work Package 3	
Assessment rubric for undertaking of the phase assessment	July 2021
All phase assessment implemented	October 2021
Documentation of key lessons and insights gained from phase assessment implementation experience	October 2021
Communication products	October 2021
Integration of lessons learned in refined versions of phase assessments	November 2021
Distribution of findings among the facilitators and lecturers and CoS managers involved.	November 2021

Work Package 4	
Guidelines and criteria for undertaking of Integrated Summative Assessments	March 2021
An exemplary IISA for the Electrician and Plumbing trades developed	June 2021
An assessment rubric for IISA developed	June 2021
Work Package 5	
Inter-disciplinary team set up to participate in and observe the implementation of the IISA	June 2021
Assessment of apprentices undertaking the IISA	September 2021 (TBC)
Report documenting the process as well as lessons learnt	October 2021
Recommendations to promote better collaboration between private and public actors for assessment processes indicating how this can contribute to a 21 st century aligned EISA	October 2021
Communication products	October 2021
Distribution of findings to relevant stakeholders identified by the assessment task team, including critical CoS stakeholders	October 2021

3. Concept

Technical-methodological concept

○ **Strategy**

Introduction

The cooperation system is successful if the cooperation partners agree on a clear and plausible strategy for achieving the jointly negotiated objectives. The strategy indicates how changes in the partner's system are to be brought about. As systems are driven by people, organisations and society, the strategy must consider the capabilities they need in order to bring about the desired changes.

Objectives for the bidder

The bidder is required to interpret the objectives of the services to be rendered for which it is responsible. Following this, the bidder presents and justifies the strategy with which it intends to achieve these objectives. The bidder is expected to provide a strategy which should entail a detailed technical concept as well as an indication of tasks to be undertaken to achieve the strategy and objectives. Both the interpretation of objectives and the strategy should thus translate the Terms of Reference into tangible and relevant approaches and tasks as well as articulate expected deliverables.

○ **Cooperation**

Introduction

Good cooperation is based on trust and the negotiation of appropriate forms of collaboration with clearly defined partners and roles. Cooperation partners have specific mandates,

capacities and opportunities for exerting influence; specific interests and attitudes regarding the change objectives, and specific formal or informal relations to other actors.

Objectives for the bidder

One of the main outcomes of the overall partner support provided by SD4GE II is that it builds trust and supports the development of artisans of the 21st century. This includes the development of processes and mechanism to support these new occupational programmes, including 21st century assessment processes. The bidder is required to present the actors relevant and critical to these developments of these assessment processes and describe interactions and cooperation with these actors. The bidder must develop a concept showing how cooperation with these actors is to be set up and put into practice.

○ **Steering structure**

Introduction

A steering structure is required that reflects agreements on how actors from the public and private sector jointly prepare, contribute to and take relevant decisions. In establishing an efficient steering structure, it is particularly important to take the subsidiarity principle into consideration.

Objectives for the bidder

The bidder is required to present and explain its approach to steering the measures in cooperation with the actors involved.

○ **Processes**

Introduction

Support processes are packages of tasks that underpin all the other types of processes.

Objectives for the bidder

The bidder is required to describe briefly the key processes for the services for which it is responsible and create a schedule that describes how the services are to be provided. The bidder is required to describe the necessary work steps and schedule.

○ **Learning and innovation**

Introduction

People, organisations and society must undergo a learning process if the cooperation system is to be capable of responding to change. Learning and innovation are rooted in knowledge. A knowledge management system in a project or organisation identifies and stores relevant and experiential know-how and prepares this for subsequent exchanges, both with other projects and within the partner organisation.

Scaling up refers to a consciously selected, targeted impetus for anchoring and disseminating experience and knowledge. Vertical scaling-up involves institutionalising strategies/approaches that have already been successfully piloted. In horizontal scaling up, the piloted strategies/approaches are transferred directly between comparable organisations. Functional scaling-up involves transferring strategies, approaches, methods, and lessons learned etc. to a new context.

Objectives for the bidder

The bidder is required to describe its contribution to knowledge management for the partners (DHET, Industry players as well as GIZ SD4GE II team and related partners) and promote vertical, horizontal and functional scaling up.

Project management of the contractor

Objectives for the bidder

- The contractor is responsible for selecting, preparing, training and steering the national experts national (short and long term) assigned to perform the outlined tasks.
- The contractor makes available equipment and supplies (consumables) and assumes the associated operating and administrative costs as specified in the tasks.
- 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 AVB ('Terms and Conditions') of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH from 2018.
- In addition, the bidder submits the following reports:
 - Contributions to reports to GIZ's commissioning
 - Quarterly reporting on the implementation status
- In its bid, the bidder describes its approach to and the procedure it intends to adopt with respect to coordination with and within the GIZ project.

The bidder is required to draw up a personnel assignment plan with explanatory notes that lists all the experts proposed in the offer; the plan includes information on assignment dates (duration and expert months) and locations of the individual members of the team complete with the allocation of work steps as set out in Chapter 3.4.

The bidder is required to describe its backstopping concept. The positions for technical and administrative backstopping must be supported through informative, brief CVs.

The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the offer in accordance with GIZ AVB 5.4.

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between GIZ and field staff
- Process-oriented technical-conceptual steering of the consultancy inputs
- Securing the administrative conclusion of the project
- Ensuring compliance with reporting requirements
- Providing specialist support for the on-site team by staff at company headquarters
- Sharing the lessons learned by the contractor and leveraging the value of lessons learned on site.

Other specific requirements

o Agility

One of the main outcomes of the overall partner support provided by SD4GE II is that it builds trust and supports the development of an increasingly demand-driven dual training approach. During implementation of the assignment, work packages will be reviewed, further developed and updated according to partner needs. Depending on evolving partner priorities under COVID-19 and the upcoming involvement of other donor organisations priorities might shift. The bidder is expected to demonstrate responsiveness and flexibility during implementation to meet the specific needs for support of the programme and its partners.

4. Personnel concept

The bidder is required to indicate by way of examples, experience of the company with similar interventions and processes of support. The company should also provide an overview of the personnel who are suited to filling the positions described, based on their CVs (see Chapter 7), the range of tasks involved and the required qualifications.

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

Team leader

Tasks of the team leader

- Overall responsibility for the advisory packages of the contractor (quality control, steering and coordination of assignment with responsible SD4GE technical advisor and if relevant with head of component and AV, deadlines)
- Ensuring the coherence and complementarity of the services of the contractor with other services delivered by the project at local and national level
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines
- Ensuring results monitoring is conducted
- Responsibility for controlling the use of funds and financial planning in consultation with GIZ's officer responsible for the commission
- Supporting the officer responsible for the commission in updating/adapting the project strategy, in evaluations and in preparing a follow-on phase
- Ad-hoc tasks

Qualifications of the team leader

- Education/training: (2.1.1): Postgraduate University qualification in Management, Business Administration, Education, Economics or relevant other degrees
- Language (2.1.2): Good business language skills in English
- General professional experience (2.1.3): 15 years of professional experience in working within the Education sector, more specifically TVET sector as well as with companies, industry associations involved in skills development in South Africa
- Specific professional experience (2.1.4) 10 years
 - Long-term experience providing advice to DHET and connected large and small-scale companies and industry associations in sectors relevant to the related CoS trades
 - Work experience at the interface of private sector demand, labour markets and employment promotion.
 - Familiarity with GIZ human capacity development processes strengthening individual capacities and supporting organisational change
- Leadership/management experience (2.1.5): 10 years of management/leadership experience as project team leader or manager in a company
- Regional Experience (2.1.6): At least 5 years experience in South Africa working in trade contexts
- Have at least 1 years experience with interacting with the new system of trade testing occupational trades in South Africa (EISA) and the related institutions and organisations involved
- Other (2.1.8):
 - At least 1 years experience with dual occupational programmse is an additional advantage

- Networks with Trade and Industry related organisations who can contribute to the development and implementation of assessments

Short-term expert pool with minimum 2, maximum 4 members

Tasks of the short-term expert pool

- Support and accompany conceptual development and implementation of both the phase assessment development and implementation as well as the development of integrated internal summative assessments for electrician and plumber trades
- Prepare, conduct, facilitate multi-stakeholder sessions to share lessons learned in all developed and implemented assessment processes (e.g. in collaboration with representatives from private sector / employers, DHET, TVET colleges, relevant other training providers, media) leading to joint agreements on the impact of these on the Trade Testing processes in South Africa- more specifically EISA
- Support to the strengthening of the competence of facilitators and lectures in the development of phase assessments as well as the implementation of integrated internal summative assessments for electrician and plumber trades
- Development of lessons learnt and guidelines for the potential future integration into regular assessment processes for occupational training programmes
- Development of communication and PR tools for processes supported
- Contribute to SD4GE II results monitoring (quantitative and qualitative results)
- Reporting (every 3 months progress reporting and final reporting)
- Contribute to ad-hoc task

Qualifications of the national short-term expert pool

- Education/training 1 - 4experts with university qualification in Management, Business Administration, Education, or relevant other degrees Language (2.6.1):
- Language (2.6.2): 1 – 4 experts with business language skills in English. Excellent communication skills both verbal and written in English
- General professional experience(2.6.3): 1- 4 experts each with 10 years' experience in Education, Training and Skills Development
- Specific professional experience (2.6.4): 1-3 experts with 10 years of experience in:
 - Understanding of TVET sector, particularly understanding its links to the Trade and Industry sector, company knowledge especially those involved in the Electrical and Plumbing trades
 - Work experience at the interface between private sector demand, labour markets and employment promotion
 - Being familiar with GIZ human capacity development processes strengthening individual capacities and supporting organisational change.
- Regional experience (2.6.5) Current approaches/initiatives/events promoting employment and job creation in South Africa.
- Development Cooperation (DC) experience (2.6.6.): 1 – 4 experts with each 10 years' experience

Soft skills of all team members

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

- Results-oriented
- Assessment imperatives
- Team skills
- Proactive
- Communication skills
- Sociocultural competence
- Efficient, partner- and client-focused working methods

- Interdisciplinary thinking

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

5. Costing requirements

The duration of this contract will be 13 months from the beginning of the contract (11 January–end February 2022).

Assignment of personnel

o **Team leader:**

Total assignment of 50 expert days including a maximum of 10 travel trips in targeted provinces within South Africa.

Key activities include: Overall coordination of the project (financially and technically) and communication with the GIZ project team, M&E and reporting; Support preparation and implementation of the phase assessments for all 13 trades and the development and implementation of the internal, integrated summative assessments; preparation and organisation of dialogue / workshop events; capture lessons learnt/guidelines for potential future integration into trade testing for dual occupational programmes; develop communication products.

o National **Short-Term expert pool (2-4)**

Total assignment of 240 expert days including a maximum of 10 travel trips in targeted provinces within South Africa.

Key activities include: Support preparation and implementation of dual demand-led short courses; preparation, conduction, follow-up of dialogue / promotional events; support strengthening of competence of small entrepreneurs to recognise the value of dual training approaches; support to transition from learning to earning; capture lessons learnt/guidelines for potential future upscaling/dissemination; develop communication products

Travel

The budget should include travel, per diems, overnight accommodation allowances, flights and other travel costs for all domestic travels. Use of the travel budget should be made in the most economical way, for flight tickets and accomodation. Reimbursement will be made according to GIZ-/German Federal Ministry of Finances travel cost regulations.

Workshop costs

The budget should include workshop related costs, including venue and catering costs.

Supplies (consumables)

The budget should include supplies (including necessary assessment related basic equipment) that might be required for implementation of the phase assessments as well as internal integrated summative assessments (IISA) for the electrician and plumbing trades.

Flexible remuneration item

A fixed budget of ZAR 100,000.00 as flexible remuneration item is included in the price schedule. The contractor shall be permitted to exceed the contractually agreed quantities

up to the amount of the flexible remuneration item, considering the contractually agreed individual rates and bases for invoicing. The budget can be drawn upon all costs in connection with the advisory services.

Use of the flexible remuneration item must be approved in text form by GIZ's technical contact person/officer responsible for the commission before the costs in question are incurred.

6. Inputs of GIZ or other actors

GIZ and/or other actors are expected to make the following available:

- Contacts to relevant partners in South Africa

7. Requirements on the format of the bid

The structure of the bid must correspond to the structure of the ToRs. It must be legible (font size 11 or larger) and clearly formulated. The bid is drawn up in English (language).

The complete bid shall not exceed 10 pages (excluding CVs).

The CVs shall not exceed 4 pages and must indicate the position and job the proposed person held in the reference project and for how long.

8. Annexes

1. SD4GE II Factsheet
2. SD4GE Results model

9. Other Requirements

10. Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than 14.12.2020, 23h00 all documents must be in PDF.
11. Please do not mention any price for this measure on your cover letter/Technical proposal.
12. Please submit your tax clearance certificate with the bidding documents.
13. Please submit your proposal in ZAR currency
14. **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.**