

TERMS OF REFERENCE

THE APPOINTMENT OF A SERVICE PROVIDER (OR SERVICE PROVIDERS) TO DESIGN AN IMPACT EVALUATION OF THE CHILD SUPPORT GRANT AND UNDERTAKE A BASELINE STUDY

1. PURPOSE

To appoint a service provider or a consortium of service providers to:

- Design a rigorous impact evaluation of the Child Support Grant
- Undertake data collection for the baseline study.
- Analyze the data and
- Produce a baseline report.

2. INTRODUCTION

2.1 Combating poverty through social development

Unemployment and poverty are long-term, persistent problems in South Africa with between 35% and 50% of the country's population living below the per capita poverty line of R322 per month. The national Department of Social Development (DSD) is mandated by the Constitution of the Republic of South Africa to provide sector-wide national leadership in social development, with poverty the most pressing issue to be addressed by the country's social development departments and agencies.

The DSD's responsibility for providing leadership is supplemented by additional roles, described in several pieces of legislation and in various policies, including the Social Assistance Act of 2005, the Children's Act of 2005, the White Paper for Social Welfare (1997) and the 1998 Population Policy. These call for the Department to develop and implement programmes for the eradication of poverty, to provide social protection and promote social development amongst South Africa's poor, vulnerable and marginalized people.

The mission of the Department is to ensure the provision of comprehensive, integrated, sustainable and high quality social development services against vulnerability and poverty and to create an enabling environment for sustainable development with those committed to building a caring society. The DSD's aim is to provide comprehensive, efficient, effective and quality services which will contribute to a self-reliant society, based on the principles of Batho Pele and in keeping with other relevant policy frameworks.

The DSD implements its three broad programmes (Social Security, Social Welfare and Community Development) in partnerships with the two social development agencies (the National Development Agency and the South African Social Security Agency, the DSD's partner in this impact evaluation), its beneficiaries, provincial social development departments, non-profit organisations and others sharing its vision.

The most profound values that underpin social protection of children and other vulnerable groups in South Africa are the human rights enshrined in the Bill of Rights that is part of the Constitution. These rights form the basis of all policies, agreements and interventions that affect children and others targeted by the DSD.

The rights-based approach impacts on and influences all aspects of DSD's work and includes the right to gain access to services, to enjoy administrative justice, to have access to information and to participate in processes as appropriate.

2.2 The Minister of Social Development's focus on children living in poverty

In 2007, the Minister of Social Development made "Putting Children First" the Department's theme for the next three years. In terms of the theme, children, especially those living in severe poverty, are prioritized in the Department's main programmes.

Around 60% of South Africa's children live in poor families. The high incidence of children living in poverty contributes to and causes a range of social problems, such as a high drop out rate at secondary school level. HIV/AIDS is another example of a poverty-related factor that impacts significantly on children. It is estimated that approximately 1.7% of all children are infected with HIV/AIDS and that by 2010 more than 3 million children will have been orphaned by the disease. Child labour, children living on the streets, orphaned children and those in conflict with the law are some of the other child-related issues prioritized by the DSD.

It is also recognized that despite the wide coverage of the Child Support Grant, a large number of children are still reported to often experience hunger because of shortcomings in the policy and its implementation.

2.3 Child benefits

There are a range of child benefits provided through the social development sector's social security system, namely the

- Child Support Grant,
- Foster Child Grant,
- Care Dependency Grant, and
- Social Relief of Distress.

These are available to poor children and those in need of care. In addition to these benefits, there are a range of other publicly-provided services available to children living in poverty, including free health care for children less than six years of age, school nutrition programmes, free schooling in certain areas, housing subsidies (provided to families) and some free municipal services.

Social development benefits and services are targeted programmes, based in some instances on income and in others on geographical location.

2.4 M&E responsibilities

Monitoring and evaluating the implementation of programmes is one of the DSD's major responsibilities. The monitoring and evaluation it undertakes provides evidence to support policy, strategy and planning processes and contributes to performance management and improvement. Similarly, SASSA's M&E responsibilities are a major component of its responsibilities, aspects of which intersect with DSD's competency. For practical, strategic and other reasons, the DSD and SASSA are committed to an M&E partnership and are jointly undertaking this impact evaluation as part of their programme of collaboration.

Amongst the various monitoring and evaluation (M&E) tools, rigorous and thorough impact evaluations have a special role to play in supporting evidence-based policy and resource allocation and if undertaken well are highly persuasive and useful.

Impact evaluations are undertaken in order to improve the design of programmes and their operations and should help to ensure programme sustainability. The DSD considers impact evaluations to be operational and management tools, not academic exercises. They are undertaken to assist in showing clearly and indubitably what works and to allow the identification of the best uses of allocated budget resources.

The Child Support Grant (CSG) is one of the most significant national programmes in the fight against child poverty. (More information on the Grant is provided in the next section of this Terms of Reference). Sound, carefully planned impact studies are essential to measure the impact of the grant over time.

2.5 Previous impact studies

South Africa has made significant progress in the development of systems and the collection of data for monitoring and evaluating the impacts of its social grants. To date, most of the completed studies provide descriptive information (or profiles) of program beneficiaries and information on coverage and take-up of the grants, using administrative data (from the grant administration system, SOCPEN) and through national surveys of program beneficiaries' households.

In 2005, the DSD undertook a Social Security Panel Survey, recognizing the importance of longitudinal data and the need for information on non-beneficiaries when estimating impacts. The Survey included several social development grants with a report on findings from analysis of the data released in 2007. Because the Survey did not focus on the CSG specifically, the Report did not meet the need to measure the grant's impact on the lives of its beneficiaries.

Acknowledging that a more rigorous impact evaluation is essential, the DSD and SASSA are now initiating a focused four-year evaluation of the impact of the CSG. As with all impact evaluations, the process will start with the design of the study and the collection of baseline information against which to measure future impacts, the focus of this Terms of Reference.

2.6 A 5-stage impact evaluation

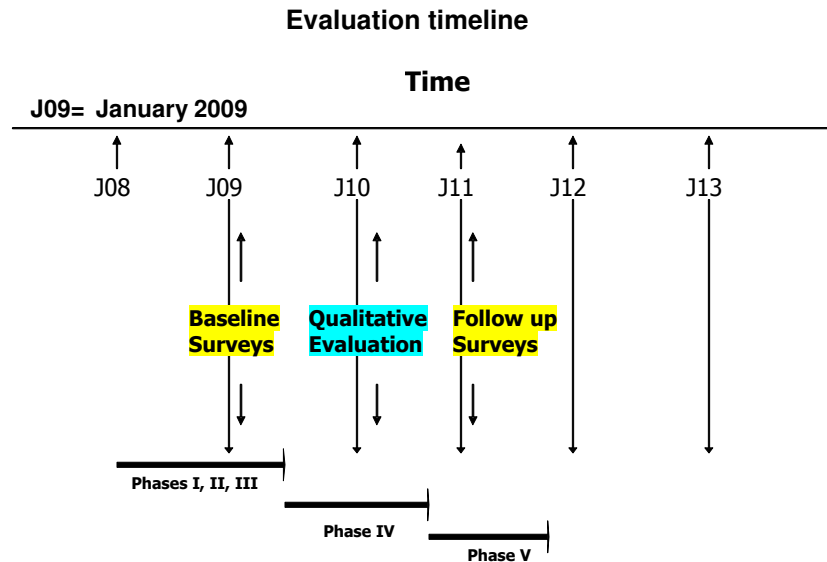
The impact evaluation of the CSG will span a four-year period divided into five implementation stages. It will combine quantitative and qualitative tools and methodologies.

Stages I through III, which are the focus of these TOR, will deal with:

- (i) The conceptualization of the overall evaluation strategy - a detailed focus on the quantitative impact evaluation;
- (ii) The design of the survey instruments for the quantitative impact evaluation; and
- (iii) The collection and analysis of the baseline.

Stage IV and Stage V, which are not the focus of these TOR, will deal with:

- (iv) The conceptualization and implementation of the qualitative evaluation (with preliminary work likely to have been undertaken in this area by SASSA and DSD by that stage); and
- (v) The fielding of follow-up surveys and preparation of the first impact evaluation report.



3. BACKGROUND

3.1 Current Structure of Social Security in South Africa

Social Security is currently the South African government's major programme aimed at providing resources to vulnerable groups in need. The provision of social assistance benefits constitutes the largest part of the Government's poverty alleviation programme.

3.2 Grant types and their payment

Since April 2005, the South African Social Security Agency (SASSA) undertakes Social Security implementation, with the actual delivery of grants taking place through cash payments at pay points, through the post office and through banks.

SASSA's implementation role makes it one of the grant's key institutional stakeholders and provides the rationale for its co-ownership of the impact evaluation.

Existing policy makes provision for various different grants to be paid as part of the programme. These are as follows:

- Old Age pensions
- War veterans pensions
- Child support grants
- Disability grants
- Care dependency grants
- Foster child grants
- Grants in aid
- Care dependency grants
- Grants providing relief to citizens in distress.

Each of these grants serves a particular purpose and taken together are intended to ensure a minimum threshold of support for people who find themselves in difficult situations.

3.3 Social Security in South Africa

Viewed comparatively, over the last 15 years South Africa has developed a relatively sophisticated system for providing cash transfers that covers its target population fairly well. The country's social assistance delivery mechanisms and operational arrangements are comprehensive and in are somewhat unusual amongst comparable middle-income countries

Until the 1990s, the basic structure of the South African state's welfare transfers system was dominated by means-tested, non-contributory old age pensions and disability pensions. The system was characterised by racial discrimination in terms of access to the grants and the levels of benefits. After 1990 significant progress was made in removing racial inequities from the two programmes. The resulting equalization saw improved access and increased real benefit levels for Africans while those of white pensioners were reduced.

The reforms of the early 1990s did not initially extend to state maintenance grants. These grants, payable in the form of parent and child grants were means-tested benefits payable to a natural parent who could not, for various reasons, rely on the support of the second parent. If the second parent was alive, it was necessary to apply for a private maintenance order through the courts and only if this failed (or the amount awarded was very low) was the child eligible for the grant.

This bureaucratic hurdle in conjunction with very low awareness of the grant meant many eligible children did not access the grant. In 1990, only 0.2% of African children were in receipt of maintenance grants, while 1.5% of white children, 4.0% of Indian children and 4.8% of Coloured children received the grant.

3.4 The Child Support Grant

In December 1995, the South African government appointed the Lund Committee to evaluate the existing system of state support and to explore new alternative policy options targeting children and families.

The Committee's report recommended a new strategy to replace the existing state maintenance grant (SMG). The strategy it proposed included a child-linked grant with a lower monetary value than that of the SMG, but targeted at a wider group of beneficiaries, particularly those considered most disadvantaged: children living in rural areas and informal settlements.

The principles for the implementation of the new child support grant were as follows:

- The CSG would contribute to the costs of rearing children in very poor households;
- The CSG would be linked to an objective measure of need, a standard means test;
- The operation of the CSG would acknowledge the State's fiscal constraints and limitations;
- The focus of the grant would be on children, not on the family, so the grant would follow the child, regardless of the care-giver's identity; and
- The CSG would form part of general poverty relief efforts.

The CSG was introduced in April 1998, at a level of R100 per month for each child younger than seven years of age, paid to the child's primary care giver. Applicants for the grant were required to pass a means test (based on household income), to produce certain documents and to demonstrate efforts to secure funds from other sources.

When the Child Support Grant (CSG) was introduced it was intended to cover the poorest 30% of children and means-testing was used to check that the child was residing in a household with an income beneath a certain threshold. The threshold was set at R800 for children living in urban areas and at R1100 for those living in rural areas or in informal settlements.

The strict requirements prevented many genuine caregivers of children in need from applying for the grant, and in June 1999, the low take-up rate was recognized and the rules were changed. The means test was changed to make use of "personal income" rather than household income and the documentary requirements were eased.

The means test has remained unchanged in nominal terms since 1998, despite the fact that the Consumer Price Index rose 45% between April 1998 and June 2005. About half the children eligible in terms of their age currently receive the grant.

3.5 CSG eligibility extensions

The government has increased the age limit for eligibility in recent years. This is a positive development but the greatest concern remains the level of the grant: initially set at slightly above the average household subsistence level to feed a child less than 6 years, it did not include provision for shelter, transport or clothes.

The grant was seen as part of a wider package of programmes contributing to human development through improved health care, primary education, subsidies housing, land reform and employment creation through economic empowerment programmes.

In March 2004 Cabinet approved an extension of the CSG, lifting the age limit to nine years old. A year later this was increased to eleven years. In April 2005 the age limit was again raised, this time to include children younger than fourteen years of age and in January 2009 the age limit will be raised to children under the age of 15.

The amount granted has also changed since 1998, with increases that have outstripped inflation. While the initial monthly benefit was R100 in 1998, it is currently R 210 and will be raised to R220 in October 2008.

4. AIMS AND OBJECTIVES OF THE CHILD SUPPORT GRANT IMPACT EVALUATION

The aim of this Terms of Reference is to identify a service provider to design a rigorous impact evaluation of the child support grant (CSG), to collect the necessary data and prepare a baseline report against which impact can be measured in subsequent years.

The objectives of the contract are to provide insight into key evaluation questions including:

- The impact of early vs. no or late enrollment onto the CSG (i.e. lengths and intensity of treatment) on children between the ages of 0 (i.e. newborn) and 2 in terms of:
 - Children's nutritional status, cognitive and physical development
 - Children's utilization of preventive health services and curative services
 - Children's health status (for example morbidity)
 - Household members' utilization of health services and curative services
 - Households' total and food consumption levels and composition.

- The impact of the CSG expansion to 14 years old and – eventually older children (15-17 years old) - on issues such as:
 - The proportion of their consumption expenditure allocated to nutrition
 - School enrollment and attendance, drop out and repetition, school progression and labor force participation
 - Utilization of preventive health services and health status (for example morbidity)
 - Risky behaviors (alcohol, substance abuse, unprotected sex, etc.) and
 - Other household member's labour participation and employment

The quantitative impact evaluation should control for supply side factors, among them, those related to access to services and, to the extent possible, to the degree of heterogeneity in the quality of those services.

5. SCOPE OF THE WORK – METHODOLOGY

5.1 Overall Evaluation Strategy

The commencement exercise for the first phase will entail the formulation of an overarching, detailed evaluation strategy. This should comprise a concise statement of the evaluation questions to be addressed by the evaluation, an explanation of why they are pertinent and clear plans for how the evaluation results will be used to address future policy and strategic questions. The strategy should specifically propose five provinces in which to undertake the study and explain the criteria on which they were selected.

The overall strategy must indicate very clearly exactly what methods and instruments will be used to provide information to answer the central questions, the institutional and operational arrangements to be followed for their application and implementation and how the results of the evaluation will be utilized. The strategy should explicitly consider attribution issues in a complex operating environment and must specifically address the need to distinguish the CSG's impacts from other possible causal factors, such as general development initiatives and other kinds of social security grants.

Because of South Africa's significant progress in increasing coverage and take up of the CSG, it will not be possible to use a randomized experimental design (which would generate statistically equivalent treatment and control groups) to construct simple estimates of average CSG program impacts. In addition, South Africa's constitutional provisions require the enrolment (as soon as possible) of any children identified as eligible but not receiving the CSG, which would also preclude the use of eligible but non-participating cases for a control group.

5.2 Quantitative Evaluation Strategy

To address the main questions of the quantitative evaluation, prospective service providers should consider quasi-experimental methodologies to build a control or comparison group when it is required. However, service providers are welcome to propose different evaluation strategies.

In their proposals, interested service providers are invited to clearly describe the methodological approach(es) that they would follow and highlight their strengths, limitations and innovative features. Prospective service providers' Technical Proposals should also identify possible obstacles and proposed strategies to overcome them.

In principle, baseline surveys (for example, household, community-level surveys) for the quantitative evaluation should be fielded no later than the first quarter of 2009.

The need for greater clarity regarding topics and strategies for the qualitative impact evaluation will be addressed during stage IV of this multi-year evaluation but should be considered and reflected upon in the overall design prepared in Phase One. It is also likely that SASSA and DSD will undertake strategic preparatory work in this area (e.g. undertaking a pilot or preliminary study) before the implementation of Phase 4 but details in this regard are still to be determined.

5.3 Minimum standards for the definition of the sampling strategy

The sampling strategy will be determined by the design proposed for the quantitative evaluation strategy, the set of indicators proposed to address the main impact evaluation questions and the expected impacts on those indicators.

The impact hypothesis should be proven at a 95% significance level and with a minimum power of 80%.

In their proposals, service providers are expected to provide a detailed description of the hypothesis and of the process used to calculate the size of the sample proposed for the quantitative evaluation. Proposals should also identify which five provinces should be included in the impact evaluation, along with persuasive reasons for the selection.

5.4 Minimum standards for the design of the survey instruments

Survey implementation is expected to take place at the household/family and individual (within households/families) levels and at the community level.

The household/family survey should include, among others, the following modules:

- Dwelling and socio-demographic characteristics of the household
- Education
- Health (including information on risky behaviors)
- Consumption
- Income (monetary and non-monetary including remittances)
- Anthropometric measures
- Use of time by household members
- Access to other programmes, including grants
- Possession and accumulation of assets (including financial assets)
- Process of application to the CSG

During the questionnaire design phase, the service provider will review the content of multi-purpose household surveys available in the country (general household survey, demographic and health survey, income and expenditure survey, national income dynamic survey, etc.).

The community level questionnaire should characterize the situation of health, education (including pre-school and grade-R), water and sanitation, welfare services, among others, available at the community level in terms of quantity, accessibility and perhaps quality.

6. SCOPE OF WORK- IMPLEMENTATION

6.1 Minimum Activities

The Service Provider will carry out the following minimum set of activities under the lead of the M&E Chief Directorate of the Department of Social Development (DSD).

Stage I – Overall Strategy and Quantitative Evaluation Planning Stage

- Formulation of the overall evaluation strategy
- Finalization of a result framework for the quantitative evaluation, an evaluation strategy and an implementation plan;
- Finalization of the sampling strategies;
- Preparation of the field-work operation plan;
- Design of the survey instruments;
- Piloting of the survey instruments;
- Analysis of the data collected during the pilot;
- Preparation of the pilot surveys implementation report;
- Revision and finalization of the survey instruments for the baseline;

Stage II – Quantitative Baseline Surveys: Implementation Stage

- Surveys field-work;
- Data cleaning;
- Preparation of a survey baseline implementation report including a detailed description of the processes followed during the field-work;

Stage III - Analysis and preparation of the baseline survey report

- Analysis of the baseline data;
- Preparation of the Baseline Survey Report;
- Presentation and discussion of the Baseline Survey Report with relevant stakeholders;

7. EXPECTED DELIVERABLES (OUTPUTS)

- A. Final work plan including, among others, a detailed description of: (i) activities, (ii) timeline, (iii) allocation of responsibilities, etc. (to be delivered no later than two weeks after signing the contract);
- B. Final Overall Evaluation Strategy and Quantitative Impact Evaluation Design and Implementation Plan including, among others: (i) a detailed description of the final quantitative evaluation methodology/strategy adopted; (ii) final result framework for the quantitative evaluation and definition/description of the indicators; (iii) survey questionnaires to be piloted; (iv) field-work operation implementation plan for the pilot and the baseline surveys (to be delivered no later than 14 weeks after signing the contract);
- C. Implementation Report of the Survey Instruments Pilot including, among others: (i) a detailed description of the process followed for the implementation of the pilot of the survey instruments; (ii) final survey questionnaires to be used in the implementation of the baseline surveys; and, if needed, (iii) a revised field-work operation implementation plan for the baseline surveys (to be delivered no later than 20 weeks after signing the contract);

- D. Baseline Surveys Implementation Report including a detailed description of the processes followed for the implementation of the baseline surveys (to be delivered no later than 28 weeks after signing the contract);
- E. Baseline Report which should include a detailed characterization at baseline of the population belonging to the “control” and the “treatment” groups and which will address the topics selected for the CSG quantitative impact evaluation (to be delivered no later than 36 weeks after contract’s signature).

8. TIME FRAMES

For the quantitative impact evaluation, baseline surveys should be collected no later than the first quarter of 2009 and the Baseline Report should be prepared by the end of the second quarter of 2009 (Stage I through Stage III).

The activities highlighted in these TOR are expected to be completed thirty-six (36) weeks after signature of the contract.

9. SKILLS AND KNOWLEDGE REQUIRED

General requirements

The service provider or consortium of service providers should have successfully conducted at least two (2) similar impact evaluations of social programs in the last eight (8) years.

The service provider or consortium of service providers should have proven experience in survey design and field-work implementation for multi-purpose household and community surveys such as those envisioned for this quantitative impact evaluation. The team should comprise a number of specialists including the following:

Team Leader

Must hold a Ph.D. in Social Sciences (preferably economics / statistics / public health and related disciplines). At least eight (8) years of experience in the design and implementation of impact evaluations for social assistance programs, preferably focusing on cash transfers. Previous experience as team leader of impact evaluation teams preferred.

Economist

Must have a Ph.D. in Economics or Econometrics. Should have at least five (5) years of experience in the design and implementation of impact evaluation for social assistance programs.

Statistician

Must have an M.Sc. in Statistics (preferably Ph.D.) Should have at least five (5) years of experience in the design and implementation of large (above 1000 observations) multi-purpose household surveys and community surveys.

Public Health Specialist

Must hold a Masters, preferably a Ph.D. in Public Health or Nutrition. Should have at least five (5) years of experience in the design and implementation of impact evaluation of public health or nutrition programmes.

Field-work Coordinator

Must be in possession of a B.A. degree or equivalent (though a Masters is preferred). Should also have at least five (5) years of experience in leading teams for the implementation of large (above 1000 observations) multi-purpose household surveys and community surveys.

All team members should be fluent in written and spoken English.

10. BID PROPOSAL

The bid proposals from prospective service providers must include:

- Proposed methodology and approach that will be utilized in the completion of this task, which includes a detailed project plan reflecting project phases, time-frames, outputs and budgets.
- Demonstrable experience of the prospective bidders engagement in similar work. This must be further substantiated with at least four (4) contactable references indicating contact details and the value of the contract on which the reference is based.

11. MANAGEMENT OF THE CONTRACT

The project is to be jointly managed by SASSA and DSD with the Department acting as the lead agent for this component of the evaluation process. SASSA, DSD and UNICEF will form a Technical Steering Committee (TSC) to provide guidance and supervise the activities outlined in this TOR.

Management within the Department of Social Development

The Director: Strategic Information Analysis and Monitoring will be the responsible manager for the contract. She shall act as the link between the service providers and the Department.

The Manager shall be responsible for:

- Tracking the progress of the tasks agreed upon within pre-defined time frames,
- Assessing the quality of the product and the process,
- Providing comments and guidance throughout the process and the draft report and
- Scheduling meetings with service provider as and when required.

Management within the service providers and their reporting requirements

The service provider will be responsible for all management arrangements within the consultancy, the fieldwork teams and all sub-contracted individuals or teams.

The service provider shall also be responsible for:

- The delivery of a high quality product to the specifications of the Department,
- The Service Providers are responsible for the provision of monthly progress reports to the Department for the duration of the project,
- The Service Providers will attend meetings as and when required by the Department.

12. PAYMENT SCHEDULE

Payments will be made upon presentation of deliverables as indicated in section 7 of this TOR to the satisfaction of DSD and a related invoice.

The payment schedule will be as follows:

- First payment (10% of total contract fees): after signing the contract and presentation of deliverable A.
- Second payment (15% of total contract fees): upon presentation of deliverable B
- Third payment (20% of total contract fees): upon presentation of deliverable C
- Fourth payment (15% of total contract fees): upon presentation of deliverable D
- Final payment (40% of total contract fees): upon presentation of deliverable E

13. GENERAL CONDITIONS OF THE CONTRACT

The general conditions of contracts as set out by the National Treasury will be applicable in all instances.

14. SPECIAL CONDITIONS OF THE CONTRACT

Prospective bidders must submit the following:

- a) A response to each of the elements identified in the evaluation matrix relevant to that section, namely:
 - Proof of experience and skills of the researchers that will participate in the:
 - i. Design of the quantitative impact evaluation strategy
 - ii. Design of the quantitative research instruments
 - iii. Analysis of quantitative research data.
 - Relevant references of similar projects conducted are required.
- b) Researchers are required to have the ability to work with creativity, sensitivity and insight and a complete CV for each member of the team must be submitted. Proof of experience, skills and knowledge in co-coordinating and implementing large-scale quantitative research projects on a national scale is required. The service provider must also demonstrate the ability to plan, execute and manage survey data effectively
- c) Proof of the availability of suitably qualified staff such as field workers and supervisors is required. Profiles reflecting skills level and experience of field workers and supervisors and other team members must be provided and should include relevant references to participation in similar research projects.
- d) Service providers are invited to clearly describe the methodological approach(es) they would follow to ensure the CSG impact evaluation meets the standard required to be considered rigorous.

The responses must not be more than seven pages per element for (a) (b) and (c) for purposes of evaluation. For (d) (the technical proposal) no more than 10 pages should be

submitted. While an annexure may be included, such material may not be considered for evaluation purposes. Each evaluation element must be addressed in chronological order.

All prospective bidders shall have to treat all available data provided by the Department in the process as strictly confidential and not for any form of distribution or use unless express written approval is obtained from the Department in advance.

The appointed bidder will be required to invoice the department after delivery of the service, quoting the bid number, with full description of the actual services received by the department and the order number.

The successful bidder will enter into a contractual agreement with the department of Social Development.

15. BRIEFING SESSION

A non-compulsory briefing session will be held as follows:

Date: 31 October 2008
Time: 10h00
Venue: HSRC Building
Ground Floor – the Room number will be indicated at reception.

16. EVALUATION CRITERIA

16.1 The tender will be evaluated in terms of 3 dimensions:

- Functionality – 70 %
- Price - 20%
- Specific Goals and equity ownership - 10%

16.2 A panel representing the Department of Social Development, UNICEF and an independent expert advisor will evaluate the proposals received according to a set of evaluation criteria.

16.3 The Department of Social Development reserves the right not to accept the lowest bid, as the elements listed in the evaluation matrix below will play a major role in the evaluation of proposals. Furthermore, the Department of Social Development is not bound to select any of the organizations or individuals submitting a proposal.

16.4 Prospective bidders are required to complete the SBD 6.1 (Preference points claim form).

16.5 Bid proposals will be evaluated in accordance with the 90/10-preference point system, as contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000). Of the possible 100 points, 20 points will be for price, 70 points for functionality and 10 points for specific goals and ownership.

16.6 Evaluation of bids will follow a two phase procedure: the first phase will focus on assessing each proposal's functionality in terms of what is contained in the

documentation provided with the bid. Price will not be considered during the first phase.

- 16.7 In respect of the evaluation matrix, prospective service bidders will be rated from 1 to 5 with:
- 1 = very poor,
 - 2 = poor,
 - 3 = average,
 - 4 = good and
 - 5 = very good.

Bidders that score less than 70% (49 out of a possible 70 points) in respect of functionality will be considered as not meeting the necessary standard and will not be evaluated further.

- 16.8 Once the first phase is completed, the second phase evaluation of bids will be undertaken, during which price is taken into account. The ceiling price indicated in each bid will be the basis for calculating the points to be awarded.
- 16.9 The total number of comparative points for each bid will then have the 90:10 preference system applied as part of the 2nd phase of the bid evaluation procedure.
- 16.10 In order to ensure meaningful participation and effective comparison, bidders are requested to furnish detailed information in substantiation of their compliance to the evaluation criteria.
- 16.11 Please note that the price tendered must include all costs.
- 16.12 The Equity Ownership and Specific goals promoted are for:
- Historically Disadvantaged Individuals
 - Women
 - Disability
 - Skills Transfer of human resources (at a consultancy level).
- 16.13 The evaluation criteria to be used to assess functionality are provided below.

A. EVALUATION MATRIX

.	ELEMENT/CRITERIA	1	2	3	4	5	Weight	Total
1	Proof of experience and skills of the researchers that will participate in the: <ul style="list-style-type: none"> • Design of the quantitative impact evaluation strategy • Design of the quantitative research instruments and the • Analysis of quantitative research data. Relevant references of similar projects conducted are required. Researchers are required to have the ability to work with						20	

	creativity, sensitivity and insight. Please attach individuals' CVs.							
2	Proof of experience, skills and knowledge in co-coordinating and implementing of large-scale quantitative research projects on a national scale. The service provider also has to demonstrate the ability to plan, execute and manage survey data effectively.						10	
3	Proof of the availability of suitably qualified staff such as field workers and supervisors is required. Profiles reflecting skills level and experience of field workers and supervisors and other team members should be provided. Relevant references of participation in similar research projects should be provided.						20	
4	Service Providers are invited to clearly describe the methodological approach(es) that they would follow to execute a rigorous impact evaluation of the CSG and highlights strengths, limitations and innovative features of this (or those) approach(es). Service providers should also identify possible obstacles and proposed strategies to overcome these obstacles (in their Technical Proposal).						20	
	TOTAL						70	

B. MATRIX FOR EVALUATING BIDDERS IN TERMS OF PREFERENTIAL POINTS CLAIMED

No	Elements	Weight
1	HDI	5
2	Women	3
3	Disability	1
4	Skills transfer of human resources	1
	Total	10

All enquiries can be addressed to:

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