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***TERMS OF REFERENCE***

**For the Provision of Services to the Jobs Fund to Undertake an Impact Evaluation of the Diepsloot Industrial Development Zone Incubation Hub (JF2/4154)**

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**Programme Identification**

Name of Client	The Jobs Fund
Name of Project	Diepsloot Industrial Development Zone Project
Contracting Authority	Government Technical Advisory Centre (GTAC), National Treasury
Project Purpose	Evaluation of the Diepsloot Industrial Development Zone Incubation Hub

## Contents

1	Request for Proposal .....	3
2	Background Information .....	3
2.1	The Jobs Fund.....	3
2.2	The Diepsloot Industrial Development Zone .....	4
2.3	Anticipated Project Outcomes.....	5
2.4	Purpose of the Evaluation.....	7
3	Focus of the Evaluation.....	7
4	Methodology .....	8
4.1	Evaluation Questions .....	8
4.2	Intended Users and Stakeholders of the Evaluation.....	11
5	Scope of the Services to be Provided .....	11
5.1	Sampling.....	11
5.2	Monitoring & Result Measurement System Development and Fieldwork.....	11
5.3	Aggregation and Assessment of Research .....	12
6	Expected Outputs, Timeline and Milestones .....	12
6.1	Outputs.....	12
6.2	Timeline and Milestones .....	13
7	Proposals.....	13
7.1	Proposal Structure .....	13
8	Key Personnel .....	14
8.1	Skills, Experience and Competencies .....	14
9	Evaluation Criteria.....	15
9.1	Stage One .....	15
9.2	Stage Two .....	18
10	Financial Implications.....	19
11	Contracting Authority .....	19
12	Bid Validity Period.....	19

# 1 Request for Proposal

Suitably qualified service providers are invited to respond to this Terms of Reference (ToR) for evaluation services related to the Jobs Fund's Diepsloot Industrial Development Zone (DIDZ) Incubation Hub. The Government Technical Advisory Centre (GTAC) wishes to engage on behalf of the Jobs Fund a service provider to complete the evaluation within six (6) months. The service provider must put forward an appropriately qualified and suited, multi-disciplinary evaluation team with relevant experience to fulfil the evaluation requirements.

This request is issued by GTAC, under the authority of the National Treasury (NT), and will be made in accordance with NT procurement criteria and procedures.

## 2 Background Information

### 2.1 The Jobs Fund

The Employment Facilitation sub-programme was introduced by the National Treasury in 2011 to contribute to employment and inclusive growth by supporting innovative approaches to job creation and enterprise development. The main component of the programme is the Jobs Fund, a multi-year R9 billion government investment programme, which leverages complementary funding from public and private sector project partners.

The President announced the Jobs Fund during the State of the Nation Address on 10 February 2011. The objective of the Jobs Fund is to co-finance innovative public and private sector initiatives that will significantly contribute to job creation. The Jobs Fund operates on challenge fund principles, as a catalyst for innovation and investment in new ways of working that directly contribute to long term sustainable employment creation.

Globally, challenge funds have been used an effective and versatile financing mechanism with which to channel public money to catalyse pro-poor innovation and investment in emerging markets and to provide profitable ways of improving market access for the poor. In practice, challenge funds are highly versatile, and can be deployed across a variety of contexts and sectors, targeting a range of outcomes from financial education to enterprise-linked poverty reduction and 'pro-poor' growth.

The ultimate development goal of a challenge fund is, through a finite intervention period, to stimulate a long-term change in the way that local supply chains and market systems work so as to overcome cost, technology, financial barriers, etc. which may have excluded poor producers and households in the past. Systemic change in the way that market systems work

is typically the desired outcome of a challenge fund and is the product of a coincidence of factors (new technology, an environment conducive to investment, a strong and innovative private sector, etc.).

The Jobs Fund assists partners in piloting innovative approaches to sustainable job creation through four funding windows, namely, Enterprise Development, Support for Work-seekers, Infrastructure and Institutional Capacity Building. The Fund accepts applications from the private, public and non-governmental sector during calls for proposals and project partners are required to share both risk and costs by matching the grant fund allocation generally on a ratio of 1:1.

In addition to focusing on creating jobs for the unemployed, the Jobs Fund has an explicit learning and knowledge dissemination agenda, which is intended to encourage new thinking and new approaches to job creation. During the implementation process, a significant body of learning has been generated. Project-level evaluation presents an opportunity to initiate the process of documenting and sharing these insights in terms of what models are most successful in job creation and which of these models are replicable and show promise for scalability.

## **2.2 The Diepsloot Industrial Development Zone**

Spatial development is an important topic in South Africa given its political history. There remain significant disparities between different communities in terms of access to opportunities, facilities and amenities that promote socio-economic development, including employment, housing, health care, amongst other basic necessities that are pre-requisites for a good quality of life.

Since the advent of democracy in South Africa, government has striven to encourage a more equitable model of spatial development, especially within the country's cities. The National Development Plan (NDP) also highlights the need to ensure that spatial inequality is addressed, particularly with regards to, amongst other things, the effective management of rapid urbanization. Given the uneven distribution of public services, economic activity and even state capacity, South Africa has seen a steady increase in urbanisation trends. In the ten years between 2009 and 2019 alone, urbanisation in South Africa has grown by about 5.17%<sup>1</sup>.

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<sup>1</sup> <https://www.statista.com/statistics/455931/urbanization-in-south-africa/>

Diepsloot is a marginalised community that was originally designed for temporary accommodation. It has now developed into a sprawling settlement, but remains underserved and with very limited services and access to economic opportunities.

The Diepsloot Industrial Development Zone (DIDZ) project is a multi-faceted industrial park development, located within the Diepsloot Business Precinct in Johannesburg. The project stands to benefit not only from the establishment of the industrial zone within the greater Diepsloot area, but also from the Steyn City, Waterfall and the Gauteng government's planned twelve-thousand-unit housing development projects. The project's value proposition lay in its intent to realise significant socio-economic upliftment of the Diepsloot community through job creation.

Jobs were to be created through the establishment of a large industrial park for commercial and industrial users as well as the construction of a SMME Incubation Hub, which was to be co-funded with the Jobs Fund. Employment would be realised in three ways; firstly through the construction phase of the industrial park and the incubation hub, located within the park, secondly through job openings within the industrial park firms who would be incentivised through rental subsidies, and thirdly through the incubator SMMEs employing new staff in their businesses. The industrial park businesses would provide off-take agreements to the SMMEs incubated through the Hub, which would be run through a Special Purpose Vehicle as a separate entity from Century Property Developments<sup>2</sup>.

After the initial three years of operation, the incubator was to be financed through 10% of profits coming from the industrial park operations. This was to ensure the ongoing sustainability of the Incubation Hub.

The project was also to integrate with existing youth programmes run by Century Property Developments in conjunction with the South African Police Services, in Diepsloot.

### **2.3 Anticipated Project Outcomes**

Speaking at an international conference themed, "Industrial Parks for Inclusive and Sustainable Industrial Development", held in Lima, Peru, in June 2019, the Director General of the United Nation's Industrial Development Organisation (UNIDO), Mr. Li Yong said, *"Industrial Parks are invaluable to achieving structural transformation and industrialisation in developing and middle-income countries. They enhance innovation and competitiveness,*

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<sup>2</sup> Century Property Developments is a privately-owned commercial property developer, first established in 1975. It is the development partner to the Jobs Fund on the construction and running of the Riversands Incubation Hub located within the Diepsloot Industrial Development Zone.

*create employment, promote investment, economic growth, environmental protection and social inclusion”.*

The Diepsloot Industrial Development Zone (DIDZ) project aspired to be a good spatial development model for South Africa and sought to change the way that industrial parks are designed in the future. The project sought to realise two specific outcomes:

### **2.3.1 Integration of large-scale industry with SMMEs**

Incubated SMMEs were to secure minimum off-take agreements with the industries that would open shop in the park. These SMMEs would also benefit from mentorship by the large businesses with whom they would have secured these off-take agreements, improving their product, service quality, security of supply, compliance with quality standards and costs. The Hub was to also provide SMMEs with further expertise, including specialist services in business strategy, accounting, book keeping, law and production management. As the quality of the offering by the SMMEs improved the industrial firms would then also increase their off-takes from them, over time. The Hub would turn-out, every three years, a new crop of businesses that would have been sufficiently equipped to stand on their own, allowing for new incubates to enrol onto the incubation programme.

### **2.3.2 Reduction of high levels of unemployment in Diepsloot**

The project recognised Diepsloot to house both skilled and unskilled labour resources, which were not being sufficiently tapped into. The proximity of the industrial park to these available labour resources would eliminate a significant barrier to employment in the area, i.e. the prohibitive cost of transportation to work. Workers can spend up to 40% of their income on transport costs, having to take multiple taxis to get to their workplace. These factors result in a worker not being competitive in their workplace contributing to poor job retention rates.

Job creation for the Diepsloot community would come in three forms, through the project:

- Employment during construction
- Employment through industry firms
- Employment through incubated SMMEs

## 2.4 Purpose of the Evaluation

The purpose of this impact evaluation is to assess the extent to which the Riversands Incubation Hub has achieved its anticipated outcomes, at this stage of its roll-out.

## 3 Focus of the Evaluation

The focus of the evaluation will be on:

### 3.1 The extent to which the DIDZ project has successfully integrated SMMEs with large-scale industry

The evaluation will assess the extent to which the project has been able to secure partnerships between industry firms and the more than 160 incubated SMMEs. It will seek to understand:

1. the factors that have contributed to the observed progress as well as plans in place toward realization of the project's objective,
2. the Hub's level of success in equipping incubated SMMEs with relevant and appropriate skills that are commensurate with the vision of ensuring integration of SMMEs to the industrial park activities, looking at various aspects of the incubator model such as design features, curricula, etc,
3. the specific activities undertaken to ensure integration of incubated SMMEs and the Hub's alumni,
4. the extent to which the incubation model has been able to withstand and adapt to various shocks, including contending with the impacts of the Coronavirus, and
5. the future prospects of the Hub's SMME throughput and sustainability.

### 3.2 The economic impact of the DIDZ project as a spatial development initiative, including its reduction of unemployment within the Diepsloot community

The evaluation will assess whether the DIDZ project:

1. has attracted investment into the industrial park,
2. is promoting sustainable industrialisation from an environmental perspective and supports spatial integration with other developments in the surrounding areas, resulting in complementary peri urban and urban development, and

3. has been able to sufficiently draw on the labour resources in the Diepsloot community in support of its objectives. It will assess whether the proximity of the industrial park has indeed improved access to economic activity and reduced unemployment, improved livelihoods and promoted social inclusion for the Diepsloot community.

The evaluation will also incorporate an ex-post Cost Benefit Analysis to estimate the DIDZ project's overall economic benefits.

## **4 Methodology**

The service provider is to carefully consider the project context and propose the most appropriate evaluation design and methods to be used to adequately respond to the evaluation requirements. Innovative and creative approaches to these Terms of Reference will have an advantage during the adjudication process.

### **4.1 Evaluation Questions**

The evaluation questions for this assignment are set out in terms of the OECD DAC evaluation criteria, which include Relevance, Effectiveness, Efficiency, Impact and Sustainability.

#### **4.1.1 Relevance**

1. To what extent was the design of the DIDZ project relevant for the market constraints it sought to address? Was the inclusion of the Incubator Hub within the broader industrial park appropriate in achieving the project's objectives?
2. Was the DIDZ project consistent with national and regional government spatial development policy objectives?
3. To what extent was the DIDZ project ready for implementation? Did it have all the relevant regulatory approvals in place to proceed?
4. Was the Jobs Fund's involvement in this type of infrastructure project consistent with its mandate and aspirations under the Infrastructure window?
5. Was there sufficient buy-in from regional authorities for the project?

#### **4.1.2 Effectiveness**

1. Has the DIDZ project been able to attract investment into the industrial park and why?
2. To what extent has the DIDZ project been able to integrate incubated SMMEs with the retail park's supply chain?

3. Has the DIDZ project been able to secure off-take agreements for incubated SMMEs with industry firms, the Steyn City and Waterfall developments? If not, are the plans in place sufficient to ensure that this objective is still realised in the future?
4. In what ways has the DIDZ project been able to (will be able to) integrate with the planned Gauteng housing project?
5. Has the DIDZ project been able to offer participating industries the same level of incentives and terms, as envisaged at design, for taking up occupancy in the industrial park? What factors have contributed to this?
6. Is the Incubation Hub operated by a separate Special Purpose Vehicle (SPV)? To what extent is the SPV independent from Century Property Developments?
7. To what extent has the Incubation Hub been able to successfully attract SMMEs from the Diepsloot community? What factors have contributed to this?
8. To what extent has the Incubation Hub been able to offer the incubated SMMEs appropriate skills and training to ensure their successful integration with big industry within the industrial park? Where progress is not as originally expected, are the plans in place adequate to ensure that this objective is met in the future?
9. What aspects of the incubation model (marketing, revenue generation activities, SMME rental structure, service offerings, terms and conditions, etc) have been found to be beneficial to SMMEs? What aspects have not been found to be beneficial to SMMEs? What lessons can be usefully extracted from the Hub's experience thus far for the benefit of future industrial park developments?
10. Is there evidence of business growth for incubated SMMEs?
11. What has been the Hub's attrition rate? What are the factors contributing to this rate? How could these be mitigated into the future?
12. How did the COVID-19 lockdown affect the operations of the Incubation Hub; its service offering and support to incubated SMMEs?
13. How many of the SMMEs applied for relief funding? How many were approved for this funding? To what extent has the relief funding supported the incubated SMMEs?
14. Did the COVID-19 relief measures work?
15. How many SMMEs have successfully graduated out of the incubation programme? How are these SMMEs doing post incubation? Is there an alumni programme that exists between these SMMEs and the Hub?
16. To what extent will the advent of the coronavirus affect the DIDZ project's ability to achieve its short to medium term objectives? Are the measures being taken by the project adequate in safe guarding its continued operations and those of its current

SMME incubates? How could these measures be improved within the constraints of the Hub's available resources?

17. Has the DIDZ project met its job creation targets? What has contributed to this? What proportion of these jobs are from the Diepsloot community?
18. To what extent has employment been realised during construction, through the large industry firms and through incubated SMMEs?
19. To what extent has the DIDZ project met its other contracted targets? What factors have contributed to these results?
20. What factors have contributed to the overall observed results on job creation? What job creation lessons can be learnt for the benefit of future similar industrial park developments? Is there a more appropriate way of measuring / assessing the job creation potential of these types of projects?

#### **4.1.3 Efficiency**

1. Was the proportion of grant funding to matched funding appropriate for the DIDZ project? Is the financing model for this project reasonable for a public subsidy? The response to this should address the ROI on jobs delivered against the grant spent; the cost per job against value delivered; the Capital Asset Pricing Model (CAPM) and the Net Present Value for the intervention. Is this a subsidy that government could replicate in other similar initiatives?
2. Was the actual construction of the Incubation Hub cost-effective as compared to similar projects in the country? The evaluation is to incorporate a Cost Benefit Analysis in estimating this aspect of the project.
3. Is the cost structure of the Hub appropriate for its business objectives? What are the key cost drivers for the Hub?
4. Does the Hub collect appropriate rental revenue from SMMEs? Are the rental terms not prohibitive for SMMEs?
5. Do the Hub's selection and vetting criteria allow for the securing of the right SMMEs for incubation?
6. Is the process to manage rental defaults adequate and reasonable?

#### **4.1.4 Impact**

1. To what extent has the DIDZ project maintained fidelity to environmental imperatives for sustainable industrialisation?
2. To what extent have jobs created through the project improved the livelihoods of Diepsloot community members? How can any of the observed changes be attributed

to the DIDZ project? Has the DIDZ project resulted in social inclusion for the Diepsloot community?

3. Has the proximity of the industrial park improved workers' transportation costs as a proportion of their incomes? Has there been improvements in job retention?
4. What evidence exists to demonstrate that the DIDZ project has resulted in broader economic spill-over effects for the Diepsloot community and other surrounding areas?

#### **4.1.5 Sustainability**

1. To what extent will the impacts of coronavirus impact the DIDZ project's future sustainability?
2. Should the Hub review additional revenue streams?
3. How sustainable have the jobs created through the DIDZ project been?
4. What are the prospects for sustainability for the DIDZ project? What are the estimates for its future throughput rates? What are the prospects of the Incubation Hub's continued sustainability? What are the prospects for sustainability for the current incubated SMMEs?
5. What degree of involvement will the SPV continue to have after the Jobs Fund exits the project?

## **4.2 Intended Users and Stakeholders of the Evaluation**

The primary audience for the evaluation is the National Treasury Jobs Fund Project Management Office, the Jobs Fund Partner, Policy Makers, Fund Managers and Programme Designers.

## **5 Scope of the Services to be Provided**

The evaluation will centre around the Riversands Incubation Hub that was part of the Jobs Fund collaboration in Diepsloot with Century Property. It will include all the SMEs that have traded in the Hub from 2015 to date.

### **5.1 Sampling**

The evaluator must use scientific sampling methods to generate a representative sample of individuals and enterprises in and around the Hub.

### **5.2 Monitoring & Result Measurement System Development and Fieldwork**

It is envisaged that the service provider will perform the following:

- a. Design and suggest an appropriate methodological approach to adequately respond to the requirements.
- b. Design and propose an appropriate methodology to determine contribution of factors to success/failure of enterprises in the hub.
- c. Design the data collection methodology and instruments, as well as the data analysis plan.
- d. Collect, enter and analyse the data using appropriate methods.
- e. Write and present the evaluation report to the Jobs Fund and implementing partner.

### **5.3 Aggregation and Assessment of Research**

Based on the findings of the evaluation research, the final report should extract the lessons gained from the investigation and provide recommendations for future projects and suggest possible public policy implications.

## **6 Expected Outputs, Timeline and Milestones**

### **6.1 Outputs**

The following outputs are expected:

- a. An Inception report including an evaluation work plan, a design document with the evaluation approach and methodology including data collection instruments,
- b. Evaluation progress reports on a monthly basis,
- c. Draft report and presentation thereof,
- d. Final evaluation report updated based on the Jobs Fund Team comments,
- e. Appendices with details on the Methodology, Key Informants, and data collection instruments,
- f. Raw data from the field in electronic format, and
- g. +/-5-page publishable article of the evaluation results, best practice guidelines and policy recommendations.

## 6.2 Timeline and Milestones

Presented below are the timeline and milestones envisaged for the evaluation. The specific details will need to be confirmed in negotiation with the Jobs Fund to ensure timely completion of the evaluation and delivery of the evaluation report.

Activity	Due Date	Deliverable*
Contract start date	11 January 2021	Finalised and signed contract
Evaluation work plan and methodology	22 February 2021	Inception report
Design document and test data collection instruments	22 March 2021	Tested and approved data collection instruments
Data collection	14 June 2021	Cleaned data files from the field in appropriate file format (.xls, .dta, etc)
Data analysis and report writing	19 July 2021	Draft evaluation report
Presentation of draft report	13 August 2021	Presentation
Submission of final evaluation report	13 September 2021	Final evaluation report

\* In addition to these specific deliverables, service providers will be required to submit a fortnightly progress report.

## 7 Proposals

National Treasury (GTAC) reserves the right to appoint, and the service provider gives permission that previous employer and/ or institutions may be contacted to obtain references regarding the expertise and general standard work.

Based on the brief outlined in the Terms of Reference, the service provider is requested to propose the approach to the evaluation. The ToR should serve as the basis, although enhancements to the brief will be welcomed as long as they are adequately substantiated.

### 7.1 Proposal Structure

The proposal should include:

- a. Understanding of the Terms of Reference of the evaluation.

- b. Approach, design and methodology for the evaluation. This should include some description of the literature intended for review. A plan should be presented of the data and methodologies envisaged for analysis.
- c. Activity-based plan (including effort for different researchers per activity and time frame linked to activities).
- d. Comprehensive activity-based budget (in South African Rand, including VAT). A professional fees budget, combining clearly indicated individual fee rates with level of effort of all personnel (in person days), should be proposed, as well as anticipated direct costs.
- e. Key personnel (team members, roles and level of effort).
- f. Quality assurance plan (to ensure that the process and products are of good quality).
- g. Skills-transfer plan (transfer of evaluation skills from service provider to GTAC staff).

## 8 Key Personnel

Proposals should indicate the key personnel who will be directly involved in the work, together with their envisaged role. The relevant expertise of each individual to this assignment should be clearly outlined (full CVs are required).

### 8.1 Skills, Experience and Competencies

The team should have:

- a. Knowledge of challenge funds and grant mechanisms,
- b. Knowledge of publicly funded government initiatives,
- c. Experience evaluating programme management, governance and regulatory processes from an institutional perspective,
- d. An understanding of contribution analysis and the associated challenges determining cause and effect, and
- e. A minimum of a 3 year-graduate degree or relevant experience in the field of Economics/ Monitoring and Evaluation/Public Policy/ Social Science, Enterprise Development and any other relevant qualifications.

## 9 Evaluation Criteria

The successful applicant will be awarded the contract for the duration of the service requirements and will be selected based on the following two-stage process:

STAGE	DESCRIPTION	MINIMUM THRESHOLD
One	The Proposals will be assessed based on the criteria below and bidders that meet the minimum threshold of 70% will be invited to participate in Stage 2.	70%
Two	Selected bidders will be required to attend a session whereby they will present their proposal to a panel and thereafter will be interviewed. Those bidders reaching a minimum threshold of 70% for the interview will be considered for appointment.	70%

It should be noted that the stages are considered to be separate processes and, as a result, the score from Stage One will not be used in Stage Two to calculate a total overall score. These two stages are mutually exclusive and will be treated as such in the appraisal.

### 9.1 Stage One

In addition to the proposal, the bidder is expected to submit the following:

No.	COMPULSORY SUBMISSION REQUIREMENTS
1.	Resource Matrix, clearly showing the role, qualification and number of hours allocated to each team member for the completion of the project (this must be in the Resource Matrix template provided)
2.	Team Experience Matrix, clearly showing the experience of proposed team members as per the stipulated requirements (this must be in the Team Experience template provided)
3.	Project schedule/timeline (this must be in the Project Timeline template provided)
4.	Updated 3 to 5-page CV of each of the individuals showing qualifications, expertise and experience.
5.	Skills transfer plan of not more than 1 page. The plan must also include all activities the service provider will undertake to transfer skills to selected Jobs Fund employees.

The Evaluation criteria are discussed in the table below:

No.	EVALUATION CRITERIA	WEIGHT
1.	<p><b>Demonstrated experience of the service provider to provide evaluation services in the development field</b></p> <p>This will be evaluated at the applicant firm level.</p> <p><i>Scoring:</i></p> <ul style="list-style-type: none"> <li>• 9+ years = 5</li> <li>• 7 to 8 years = 4</li> <li>• 5 to 6 years = 3</li> <li>• 3 to 4 years = 2</li> <li>• &lt; 3 years = 1</li> </ul>	20
2.	<p><b>Project lead experience and expertise in carrying out evaluations particularly in the spatial development sphere.</b></p> <p><i>Scoring:</i></p> <ul style="list-style-type: none"> <li>• 9+ years = 5</li> <li>• 7 to 8 years = 4</li> <li>• 5 to 6 years = 3</li> <li>• 3 to 4 years = 2</li> <li>• &lt; 3 years = 1</li> </ul>	15
3.	<p><b>Project team experience in Spatial development; SMME and Enterprise Development; Evaluation, Research and Analytics; and Writing Journal Articles.</b></p> <p>The applicant to propose a lead under each of the 4 broad areas and the leads will be rated as per the below. These team members must be clearly marked in the proposal.</p> <p>List projects undertaken which are cross-referenced in the proposal, team experience matrix, and CVs of individual members. Minimum of 3 references.</p>	
a.	<p><b>Broad Area 1: Experience and understanding of Spatial development in the South African context.</b></p> <p>This will be based on the subject-matter lead proposed by the service provider. This individual must be clearly marked in the proposal.</p> <p><i>Scoring:</i></p> <ul style="list-style-type: none"> <li>• 9+ years = 5</li> <li>• 7 to 8 years = 4</li> <li>• 5 to 6 years = 3</li> <li>• 3 to 4 years = 2</li> <li>• &lt; 3 years = 1</li> </ul>	15

No.	EVALUATION CRITERIA	WEIGHT
b.	<p><b>Broad Area 2: Experience and understanding of enterprise development initiatives and the SMME sector in South Africa or similar contexts.</b></p> <p>This will be based on the subject-matter lead proposed by the service provider. This individual must be clearly marked in the proposal).</p> <p><i>Scoring:</i></p> <ul style="list-style-type: none"> <li>• 9+ years = 5</li> <li>• 7 to 8 years = 4</li> <li>• 5 to 6 years = 3</li> <li>• 3 to 4 years = 2</li> <li>• &lt; 3 years = 1</li> </ul>	10
c.	<p><b>Broad Area 3: Experience conducting evaluations considering a variety of methods including Contribution Analysis</b></p> <p>This will be based on the subject-matter lead proposed by the service provider. This individual must be clearly marked in the proposal.</p> <p><i>Scoring:</i></p> <ul style="list-style-type: none"> <li>• 9+ years = 5</li> <li>• 7 to 8 years = 4</li> <li>• 5 to 6 years = 3</li> <li>• 3 to 4 years = 2</li> <li>• &lt; 3 years = 1</li> </ul>	10
d.	<p><b>Broad Area 4: Experience in producing journal articles and other written outputs</b></p> <p>This will be based on the subject-matter lead proposed by the service provider in terms of number of written outputs (journal articles, working papers, research reports etc). This individual must be clearly marked in the proposal.</p> <p><i>Scoring:</i></p> <ul style="list-style-type: none"> <li>• 20 + articles = 5</li> <li>• 15 to 20 articles = 4</li> <li>• 10 to 15 articles = 3</li> <li>• 5 to 10 articles = 2</li> <li>• &lt; 5 articles = 1</li> </ul>	5
4.	<p><b>Approach: Relevance, quality and creativity of the technical approach to the research study.</b></p> <ul style="list-style-type: none"> <li>• 5 = <i>Excellent (Analyses/Studies/Dissemination directly responds to the ToR, is plausible [considering the timeline and proposed expertise], offers novel and practical ideas, and is likely to significantly exceed expectations)</i></li> <li>• 4 = <i>Good (Analyses/Studies/Dissemination responds to the ToR, is plausible [considering the timeline and proposed expertise], and is likely to exceed expectations)</i></li> <li>• 3 = <i>Average (Analyses/Studies/Dissemination responds to the ToR; is plausible [considering the timeline and proposed expertise], and will meet expectations)</i></li> </ul>	25

No.	EVALUATION CRITERIA	WEIGHT
	<ul style="list-style-type: none"> <li>2 = <i>Below Average (Analyses/Studies/Dissemination only responds in part to the ToR, is implausible [considering the timeline and proposed expertise], and is unlikely to meet expectations)</i></li> <li>1 = <i>Poor (Analyses/Studies/Dissemination does not respond to the ToR; is implausible [considering the timeline and proposed expertise], and will not meet expectations)</i></li> </ul>	
	<b>Total</b>	<b>100</b>
	<b>Total Technical Minimum Threshold to proceed to the interview stage</b>	<b>70.0%</b>

The service providers that achieve the minimum threshold in Stage One will be called for an interview. Failure to meet a minimum total interview threshold of 70% will result in disqualification of bidder.

## 9.2 Stage Two

Those bidders that meet the minimum threshold in Stage One will attend an interview, which will include delivering a presentation to the evaluation panel. This process will be used to verify the following:

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
	Demonstration of knowledge and skills	5 = Excellent (Demonstrated capability is significantly above the expected capability level) 4 = Good (Demonstrated capability exceeds the expected capability level) 3 = Average (Demonstrated capability meets the expected capability level) 2 = Below Average (Demonstrated capability is below the expected capability level) 1 = Poor (Demonstrated capability is significantly below the expected capability level)	40

NO	EVALUATION CRITERIA	GUIDELINES FOR CRITERIA APPLICATION	WEIGHT
	Demonstration of the understanding of the ToR and responsiveness of the proposal to the ToR	5 = Excellent (Demonstrated capability is significantly above the expected capability level) 4 = Good (Demonstrated capability exceeds the expected capability level) 3 = Average (Demonstrated capability meets the expected capability level) 2 = Below Average (Demonstrated capability is below the expected capability level) 1 = Poor (Demonstrated capability is significantly below the expected capability level)	60
	<b>Total</b>		<b>100</b>
	<b>Minimum threshold</b>		<b>70%</b>

Failure to meet a minimum total interview threshold of 70% will result in disqualification of bidder.

## 10 Financial Implications

Apart from the professional fees, the service provider must make an allowance in their financial proposal of 10% for travel.

The service provider will be required to attend meetings at 240 Madiba Street when deemed necessary by the Jobs Fund which will not form part of travel disbursements.

All quotations would need to specify the proposed work to be done, time and level of effort expected as well as cost.

## 11 Contracting Authority

The Contracting Authority will be the National Treasury Government Technical Advisory Centre (GTAC).

## 12 Bid Validity Period

The bid will be valid for a period of 90 (ninety) days.