REQUEST FOR PROPOSALS (RFP)

Conduct a longitudinal developmental evaluation of the National Digital Ecosystem for Post -School Education and Training Programme

BACKGROUND

JET Education Services (JET) and the Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA), have initiated a collaborative programme titled *Post School Education and Training Collaboration and Learning Opportunities and Utilisation of Data (PSET CLOUD).*

The purpose of the overall programme is **to establish an interoperable digital ecosystem** that will strengthen, coordinate and improve efficiencies in the governance and management of the postschool education and training (PSET) system. The main objective of the programme is to ensure that **data sets are interoperable, well synchronised, and used effectively** as sources of information for planning and improving efficiency in the PSET system.

Phase 1 of the programme has been completed and involved a situational analysis of the PSET sector, a mapping study, an international review of similar initiatives and a feasibility report. These research reports have been condensed and included in a publication titled *Unlocking the Power of Data: A review of the state of readiness of the Post-School Education and Training sector in South Africa for enhanced data interoperability,* released in November 2020 and available on the JET website, www.jet.org.za. The international review, *Interoperable Data Ecosystems: An international review to inform a South African innovation* is also available to download.

A high-level theory of change (ToC) for this programme has been developed (See annexure to these Terms of Reference (ToR). This ToC reflects that the programme is designed to contribute to the achievement of the **impact** that will see South African citizens being able to make informed decisions that lead to employment, in line with National Development Plan targets.

To make this contribution, the programme seeks to influence the achievement of a **long-term outcome** where the South African PSET system is aligned to the demand and supply needs of

the labour market. The achievement of this **long-term outcome** will be supported through influencing the achievement of the following intermediate outcomes.

1. South African citizens/learners utilise real-time data to make learning and career decisions; and
2. South African PSET stakeholders utilise real-time data to develop their plans and programmes.

The **immediate outcomes** that the programme seeks to deliver in the next few years are:

1. A PSET CLOUD Minimum Viable Product (MVP) to enable interoperability is available;
2. merSETA, as an early adopter, has access to an ecosystem architecture that enables it to interact with, engage and give feedback on the PSET CLOUD interoperable enabling MVP; and
3. South African citizens/learners and PSET stakeholders have access to an interoperable system for data and information on PSET.

The **assumptions** that inform the design and serve as preconditions for success and/or risks to be managed are reflected in the annexed infographic of the Theory of Change.

Phase 2 of the programme commenced in 2020 with the appointment of two service providers, one to carry out stakeholder engagement and scenario planning and the other to develop a business case and prototype for an MVP for piloting/testing over the next few months in 2021 as the programme transitions into Phase 3.

The purpose of this RFP is to invite well-experienced, independent service providers to submit proposals to conduct a longitudinal developmental evaluation of the entire PSET CLOUD programme over a three-year period, starting in March 2021, which must include the component that pilots the merSETA as an early adopter.

TERMS OF REFERENCE (TORs)

SCOPE OF WORK

The selected provider will be tasked with conducting a longitudinal developmental evaluation of the intervention including its design (intervention concepts, the robustness of the ToC, related plans, etc.) and implementation (how the PSET CLOUD programme is being implemented and how it can be strengthened). The evaluation will be implemented at strategic milestones with the purpose of providing feedback for iterative cycles of development and deployment.

A developmental evaluation is considered appropriate due to the complexity of the environment, the innovative nature of the programme, the assumption of gradual adoption or scale and the

need for timely utilisation-focused results. However, if the bidding agency feels another type of evaluation to be more suitable, a case may be made in the proposal.

The stages of the evaluation are seen to be as follows:

Stage 1: Inception

Following the appointment of the evaluation team, inception meetings and communication should take place to ensure alignment and make any necessary adjustments to the proposal and/or personnel. This stage must culminate in an agreed evaluation methodology and an initial evaluation workplan, which may change over time, depending on the needs of the programme.

Stage 2: Up to 4 months

The second stage of the evaluation will focus on the design of the intervention and its implementation to date, following evaluation criteria and answering key questions:

1. Relevance: To what extent is the design of the PSET CLOUD programme appropriate and consistent with the PSET sector's priorities and policies? To what extent have partnerships been developed with and between relevant and key stakeholders?
2. Effectiveness: To what extent have the activities and outputs of the PSET CLOUD programme been effective in contributing to the likely achievement of the outcomes and impact reflected in the ToC? What measurable progress has the programme made since its inception?
3. Efficiency: To what extent has the implementation of the PSET CLOUD programme been efficient with regards to (i) organisational design and applied delivery methodology; (ii) management and administration including record keeping; and (ii) the readiness of the merSETA to be an early adopter.
4. Sustainability: How sustainable is the PSET CLOUD programme likely to be given the many priorities and demands in the PSET sector? What are the challenges to and opportunities for the sustainability of the PSET CLOUD intervention in the medium-to-long term? Are there viable alternatives that have potential to address the interoperable principle and envisaged outcomes and impact of the programme?
5. Programme governance and management: Is the governance and programme management appropriate for the programme?

Stage 3: Month 5 to Month 30

The third stage of the evaluation will entail providing the programme team and stakeholders with continuous, real-time feedback that assists the programme to adapt to emergent developments in a dynamic implementation environment, keep on track and continuously innovate. The responsibilities of the developmental evaluator during this phase will include, amongst others, to:

1. Facilitate a workshop or workshops with programme stakeholders to facilitate a collaborative conceptualisation of the design evaluation and approach;
2. Provide quality assurance of all programme deliverables and track the details of the design evaluation and all related events;
3. Facilitate regular meetings with the programme team and stakeholders to collect data;

4. Analyse collected data and present analysis regularly to the programme team and stakeholders through data-review processes and other participatory sessions;
5. Track and communicate high quality information to the programme team and stakeholders on the programme's progress that can inform timely and data driven decision-making, and regularly record decisions, programme changes and/or changes in the implementation environment.

In addition, the evaluation team is expected to develop and deliver rapid (as close to real-time as possible) evaluations of key deliverables of this phase. evaluation team is expected to engage with. These are:

1. The prototype, which represents the first demonstration of one of the key tools or platforms to be used by the evaluation, and its actualisation of the minimum viable product. The evaluation should consider aspects such as functionality, design, user experience, etc.;
2. Adoption of PSET CLOUD tools by the merSETA;
3. Adoption of PSET CLOUD tools by other government agencies.

Critical questions to be engaged in each programme iteration will include:

1. Was the design of the PSET CLOUD programme appropriate and consistent with the PSET sector's priorities and policies? Was the design adaptable?
2. To what extent were innovative components integrated into the design and implementation of the programme?
3. To what extent have the activities and outputs of the PSET CLOUD contributed to the achievement of the outcomes reflected in the ToC? What measurable achievement has the programme made against the outcomes?
4. What recommendations emerge for consideration in the next iteration of development?

Stage 4: Month 31 to Month 36 (End of programme evaluation)

This stage of the evaluation will focus on assessing the delivery of the outcomes of the PSET CLOUD programme. Key questions at this stage of the evaluation will include:

1. Was the PSET CLOUD programme appropriate and able to contribute to the PSET sector's priorities and policies? What challenges and mitigation strategies emerged?
2. To what extent were innovative components integrated into the design and implementation of the programme among different stakeholder groups? What did adoption patterns look like, and what common challenges emerged?
3. To what extent have the activities and outputs of the PSET CLOUD contributed to the achievement of the outcomes reflected in the ToC? What measurable achievement has the programme made against the outcomes?

4. To what extent has the implementation of the PSET CLOUD programme been efficient with regards to (i) organisational design and applied delivery methodology; (ii) management and administration including record keeping; and (ii) cost allocation?
5. How sustainable is the PSET CLOUD programme given the many priorities and demands in the PSET sector?

The evaluation will be conducted over a three-year period starting in 2021, with the final report due at the end of 2023, subject to annual contract renewals based upon the results of performance reviews. The level of effort for this evaluation will not exceed 240 person days. The costs allocated must not exceed R 2m (two million rand) inclusive of VAT. The evaluator will be expected to submit regular progress reports. The frequency of reporting will be agreed upon during the inception phase.

Submitted proposals will be evaluated based on the following criteria.

EVALUATION CRITERIA

Criterion	Weight
Organisational capacity (Staff capacity, team composition and diversity)	10%
Mentoring and use of interns	5%
Previous experience (Evaluating innovative technology-based interventions in complex environments, years of experience of the lead evaluator, application of complexity theory and science, design thinking)	15%
A minimum of three references	10%
B-BBEE	10%
Price	10%
Proposal and methodology (not exceeding 10 pages excluding CVs)	40%
Total	100%

ESTIMATED TIMEFRAMES

Deadline for clarification questions: 19 February 2021
Deadline for submission of proposals: 01 March 2021
Evaluation of submissions will take place by 10 March 2021

All short-listed service providers will be requested to be available to make presentations on 15 March 2021.

The contract will commence on 01 April 2021 and end on 31 March 2024.

RFP DISCLAIMER

1. Respondents are hereby advised that JET and merSETA are not committed to any course of action as a result of their issuance of this RFP and/or their receipt of proposals. In particular, please note that JET/merSETA reserves the right to:
   a. modify the RFP's requirements and request respondents to re-bid on any such changes;
   b. not necessarily accept the lowest priced proposal;
   c. award a contract in connection with this proposal at any time after the RFP's closing date;
   d. split the award of the contract between more than one successful respondent;
   e. make no award of a contract.
2. Should a contract be awarded on the strength of information furnished by the respondent which, after conclusion of the contract, is proved to have been incorrect, JET/merSETA reserves the right to cancel the contract.
3. JET/merSETA reserves the right to undertake post-tender negotiations with selected respondents or any number of short-listed respondents.
4. Should the preferred bidder fail to sign or commence with the contract within a reasonable period after being requested to do so, JET/merSETA reserves the right to award the business to another bidder, provided that he/she is still prepared to provide the required goods or services at the quoted price.

CONTACT DETAILS

All queries should be directed to Boitumelo Manci and must be submitted via email to boitumelo@jet.org.za. Responses will be provided via email.

Proposals accompanied by CVs of the proposed team members should be submitted to tenders@jet.org.za. Technical and financial proposals may be combined.

THEORY OF CHANGE

Post School Education and Training Collaboration and Learning Opportunities and Utilisation of Data (PSET CLOUD Project)

START HERE

South African citizens make informed labour market decisions that lead to increased employment in line with NDP targets

IMPACT

Assumptions
- There is political will
- A governance system that coordinates and maintains the PSET CLOUD in perpetuity is in place

Assumptions
- There is continued leadership buy-in
- Environmental flux and unpredictable change is well managed
- Agile-credentialing is promoted
- Citizens are educated and enabled to take ownership of their data

The SA PSET system is aligned to the supply and demand needs of the labour market

LONG-TERM OUTCOME

PSET stakeholders utilise real time-data and deliver their mandates based on high quality plans and programmes

Assumptions
- Data systems are accessible
- There is a trusted network
- Data is accessible
- There is compliance with the POPI Act
- Data privacy and ownership are protected – Self Sovereign Identity (SSI)
- The merSETA ecosystem architecture delivers good results
- The performance of the PSET CLOUD and merSETA ecosystem architecture results in network externalities that lead to adoption by other PSET stakeholders

INTERMEDIATE OUTCOME

Assumptions
- More stakeholders adopt the concept of digital interoperability

South African citizens/learners utilise real time data on PSET to make learning and career decisions

South African PSET stakeholders utilise real time data to develop their plans and programmes (merSETA early adoption)

IMMEDIATE OUTCOME

South African citizens/learners and PSET stakeholders have access to the cloud for data and information on PSET

A PSET CLOUD Minimum Viable Product shared platform is available

merSETA as an early adopter has access to an ecosystem architecture that enables it to interact with, engage and give feedback on the PSET CLOUD MVP

OUTPUTS

BENEFITS/DESIRED CHANGE STATES TO PSET STAKEHOLDERS, LEARNERS AND SOCIETY WE INFLUENCE

PRODUCTS AND SERVICES WE DELIVER

WHAT WE DO

PSET CLOUD

merSETA Ecosystem Architecture

Assumptions
- DHET allows space for a professional independent team to work on this
- There are quality research outputs
- DPME champions the project
- Technology gaps can be filled
- The merSETA is stable
- There is sustained passion at merSETA
- The need for government to re-prioritise programme budgets due to COVID-19 does not impact negatively on the project
- Key stakeholders buy-into the project and are aligned despite existing challenges including the need to pay attention to the COVID-19 response
- There is cooperation and integration across the PSET system
- Key stakeholders fund their own systems
- The SETA landscape is stable

- Identify and implement key innovation projects also taking advantage of opportunities presented by COVID-19 to accelerate implementation
- Define custodianship and handover sustainability plan
- Develop & build a Minimum Viable Product (including a shared platform)
- Develop and implement an advocacy strategy directed at all stakeholders (citizens/learners, government officials etc.)
- Identify and agree a model of data ownership and data rights with stakeholders
- Develop and implement a strategy to educate all users about the data rights (citizens/learners, government officials etc.)
- Test the system

- Develop international networks and collaborations
- Finalise the feasibility study
- Develop the architecture of the PSET CLOUD
- Develop integration specifications
- Identify existing data systems (AS IS)
- Develop a business case
- Consult PSET stakeholders
- Conduct international benchmarking

- Establish a team of experts
- Review business processes and efficiencies
- Report on business process optimisation
- Establish a retention schedule and disposal authority
- Identify an information inventory
- Establish and implement knowledge management inventory
- Report on knowledge management inventory establishment
- Develop records management framework, policies and best practice

- Seize the COVID-19 opportunity and accelerate the development of merSETA ICT infrastructure
- Identify and implement a quick win COVID-19 innovation project
- Establish a metadata scheme, permission model and file plan
- Establish a Technology, Information and Knowledge Management Governance Framework
- Develop a business continuity and disaster recovery plan
- Develop and implement an information/cyber-security strategy
- Implement an integrated change management strategy and interventions

ACTIVITIES

INPUT

Technical and research capacity

Stable Funding

JET EDUCATION SERVICES
THINK EDUCATION. THINK JET.

merSETA
MANUFACTURING, ENGINEERING AND RELATED SERVICES SETA