

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

Module on Ethics and Integrity for Wits University's First Year Experience	Project number/ cost centre: 20.2106.1-001.00
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0. List of abbreviations

AVB	General Terms and Conditions of Contract (AVB) for supplying services and work 2018
BMZ	German Federal Ministry for Economic Cooperation and Development
FYE	First Year Experience Programme
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
LMS	Learning Management System
NACS	National Anti-Corruption Strategy
TA	Technical Advisor
TIP	Transparency, Integrity and Accountability Programme
ToRs	Terms of reference
WITS	University of the Witwatersrand

1. Context

Background to the TIP

Since the end of the apartheid regime in 1994, South Africa has developed into a stable democracy with a progressive constitution. However, it faces growing governance challenges: lack of good governance at all levels of government as well as endemic corruption in all sectors and mismanagement of public finances. The Transparency, Integrity and Accountability Programme (TIP) supports state and non-state actors to contribute towards the implementation of the National Anti-corruption Strategy (NACS) in a whole-of-government and societal manner. The TIP provides capacity development for anti-corruption actors in the state, civil society and the business sector. The project supports:

- Active citizenry where citizens can contribute actively to activities and initiatives in favour of transparency, integrity and accountability (output 1);
- The strengthening of institutional capacity of collaborative mechanisms, particularly the National Anti-corruption Advisory Council to coordinate the implementation of the NACS (output 2); and
- Multi-stakeholder partnerships to improve transparency, integrity and accountability meet the requirements of the human rights-based approach, including gender equality (output 3).

In addition to the whole-of-government and societal approach of the TIP, the programme actively pursues a human rights-based orientation including gender equality. The strategic reference points for the TIP are the NACS, Agenda 2030, the Medium-term Strategic Framework 2019-2024, Germany's approaches to governance, democracy and anti-corruption as well as Agenda 2063 (African Union) and Sustainable Development Goals 16.5 and 16.6.

The lead executing agency for the TIP is the Department of Planning, Monitoring and Evaluation. The TIP is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). The TIP is co-financed by the Swiss State Secretariat for Economic Affairs. The programme is part of the newly established Peaceful and Inclusive Societies cluster of BMZ and the action field Good Governance.

These ToRs form part of the TIP's implementation mandate.

Background of assignment

A broad aim of Output 1 of the TIP is to evoke positive behavioural change in ordinary people, as part of a whole-of-society approach to anti-corruption. People across sectors must take ownership of values of integrity, transparency, and accountability in their daily lives to contribute to combatting corruption in South Africa. This includes a reinvigoration of positive societal ethics and a meaningful active and collective membership of society. Through innovative means and connecting with the right stakeholders, TIP seeks to inspire this positive change.

Within this work, a key target group is youth. Young people make up the majority of South Africa's population but are often excluded from spaces of discussion on corruption, despite also being affected by it. TIP is targeting youth not just as a key beneficiary of support, but also as key changemakers to create the world they strive to live in. As young people enter adulthood and broader society, they must be equipped with knowledge and values to be part of positive behavioural change.

In order to reach youth, we must go where they are. One such space occupied by youth is the university. Universities are places of both academic and non-academic learning, where young people are journeying towards the ideal versions of themselves. In particular, the University of the Witwatersrand (WITS) has been identified as a test site for engaging with young people. The First Year Experience (FYE) is a programme of co-curricular learning available to first year students entering WITS which supports their transitioning journey from high school to university. This will be achieved by covering topics which resonate with WITS' values such as grappling with ideas of excellence, innovation, collaboration, diversity and leading in relation to others. The FYE ensures the holistic development of first years. These values align with the values the TIP seeks to promote.

By way of support to WITS and its mission to produce graduates who are well-rounded and engaged members of society, TIP is assisting in developing an online module for the FYE. The starting point for the module's content should be the enshrinement of values of transparency, accountability, ethics, integrity, equality and social responsibility in the Constitution of South Africa. The module is also intended to provide an understanding of corruption, including ways young people might experience it; to provide practical information on what to do if they might experience corruption as well as how to support others around them; and crucially, to drive the importance of, and encourage, ethical behaviour and integrity.

The module should be designed to be engaging and appealing to the identified demographic, making use of suitable digital tools and methodologies for education. This might include the use of videos and simulation games. The service provider must have a deep and thorough understanding of the target audience in their position as first year students, and in relation to adequate tools that can capture and keep their attention.

2. Tasks to be performed by the contractor

A service provider is required to: (1) Develop an online learning module for WITS which is compatible with their Learning Management System (LMS). The overall development of the online module has to be aligned with the quality requirements of global online learning standards endorsed by the National Association of Distance Education and Open Learning in South Africa (Nadeosa); (2) Compile pertinent research to guide development of content and modes of delivery including consultation with relevant WITS' representatives responsible for non-academic learning, with subject-matter experts, and with TIP Technical Advisor(s) (TA); (3) Ensure consultation with WITS technical representatives to ensure seamless compatibility of module with the LMS; (4) Conducting both technical and user-testing on content and modes of delivery; (5) Provide TIP with a comprehensive report on the production of the module, the methodologies chosen for learning, and recommendations for scalability to other academic institutions.

The required outputs for the service provider are (a) the online learning module, (b) consultations, onboarding/training and technical/user-testing (c) the comprehensive report detailing the research phase, production of the module, and recommendations for scalability.

As a final product, the service provider must provide the TIP with the contents of the module in appropriate file formats (Word/PDF documents, png/jpeg/mp3/mp4 files etc.), as well as two printed copies of printable documents, according to the agreed requirements and timelines.

Key milestones - *Progress on the current assignment will be monitored, measured and remunerated according to the delivery of the following products:*

Tasks/Activities	Deliverables	Deadline
Participate in the Inception meeting and establishment of the steering committee	Inception report	16 January 2023
Prepare initial project timeline	Draft project plan	20 January 2023
Host consultations on content and technical requirements of WITS LMS	Event reports	10 February 2023
Submit project plan identifying outputs, methodology and tools for developing module	Project plan	15 February 2023
Production of module, hosting additional consultations with WITS, TIP TA(s), and subject-matter experts, as necessary. Host consultation for demonstration.	Report on content and demonstration of module	6 April 2023
Conduct technical and user-testing	Pilot phase report	21 April 2023
Submit module to WITS with adjustments and support transition into WITS' LMS	FYE module	5 May 2023

Period of assignment: From January 2023 until May 2023.

3. Concept

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

Technical-methodological concept

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

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

The bidder is required to present and explain its approach to **steering** the measures with the project partners and its contribution to the results-based monitoring system.

The bidder is required to describe the key **processes** for the services for which it is responsible and create a schedule that describes how the services according to Chapter 2 are to be provided. In particular, the bidder is required to describe the necessary work steps and, if applicable, take account of the milestones and contributions of other actors in accordance with Chapter 2.

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

Other specific requirements

The module must incorporate innovative methods for digital learning.

Content must incorporate values of gender equality and human rights.

Project management of the contractor

The bidder is required to explain its approach for coordination with the GIZ project.

- The contractor is responsible for selecting, preparing, training and steering the experts (international and national, short and long term) assigned to perform the advisory tasks.
- The contractor is responsible for ensuring communication with the partner (WITS) as and when necessary, for the purposes of requesting information, promoting collaboration, providing updates and any other purpose necessary for carrying out the project effectively.
- The contractor makes available equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
The contractor reports regularly to GIZ in accordance with the AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH from 2018.

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

The bidder is required to describe its backstopping concept. 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 bid in accordance with section 5.4 of the AVB:

- 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
- Sharing the lessons learned by the contractor and leveraging the value of lessons learned on site

4. Personnel concept

The bidder is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 6), the range of tasks involved and the required qualifications. In selecting personnel, the bidder is required to take into consideration principles of transformation including race and gender.

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 and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, in particular 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

Qualifications of the team leader

- Education/training (2.1.1): University qualification (Masters preferred) in Education or Digital Media or Information Technology
- Language (2.1.2): Good business language skills in English
- General professional experience (2.1.3): 10 years of professional experience in the media/marketing/education/technology sector
- Specific professional experience (2.1.4; 2.1.6): 5 years in Project management, 3 years working with universities
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company

Expert 1: Researcher and content writer

Tasks of expert 1

- Research and compile content relating to ethics, integrity and anti-corruption relevant to the target audience
- Responsible for consulting with subject-matter experts and educational experts to compile content

Qualifications of expert 1

- Education/training (2.2.1): Master's degree in Social Sciences or Education
- Language (2.2.2): English (other South African languages beneficial)
- General professional experience (2.2.3): 5 years researching for and writing training or educational materials
- Specific professional experience (2.2.4): 3 years' experience in anti-corruption or youth-related issues

Expert 2: Digital professionals

Tasks of expert 2

- Convert content into digital format compatible with WITS' LMS
- Develop appropriate and innovative modes of delivering content
- Ensure technical integrity of digital module, and implement technical and user-testing
- Provide on-boarding support to partner organisation

Qualifications of expert 2

- Education/training (2.3.1): Master's degree in Digital Media or Information Technology
- Language (2.3.2): English (and other official South African languages beneficial)
- General professional experience (2.3.3): 5 years of experience in information technology and/or digital sectors.

- Specific professional experience (2.3.4): 3 years' experience developing digital solutions for education.

Soft skills of team members

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

- Team skills
- Initiative
- Understand of the needs of virtual learning formats
- Communication skills
- Sociocultural competence
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

5. Costing requirements

Assignment of personnel

Team leader:

Expert 1:

Expert 2:

45 days for all experts combined

Travel

The bidder is required to calculate the travel by the specified experts and the experts it has proposed based on the places of performance stipulated in Chapter 2 and list the expenses separately by daily allowance, accommodation expenses, flight costs and other travel expenses.

6. Requirements on the format of the bid

The structure of the bid must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) is to be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). 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 of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages. The CVs must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English (language).

If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment.

Please calculate your price bid based exactly on the aforementioned costing requirements. In the contract the contractor has no claim to fully exhaust the days/travel/workshops/ budgets.

The number of days/travel/workshops and the budget amount shall be agreed in the contract as 'up to' amounts. The specifications for pricing are defined in the price schedule.

7. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **25th November 2022** all documents must be in PDF.
- Please do not mention any price for this measure on your cover letter/Technical proposal.
- Please submit your tax clearance certificate with the bidding documents.
- Please submit your price proposal in **ZAR**.
- Our General Terms of Conditions (attached) shall not be changed/amended should you be the winner of this tender. These General Terms and Conditions will form part of the contract should you be awarded this contract. By submitting your proposal, we will conclude that you have read and accepted these terms and conditions.

- Participating more than once in same tender is not allowed and it will lead to your proposal as well as that of the company where you appear more than once being disqualified. The responsibility rests with the companies to ensure that their partners/experts are not bidding/participating more than once in same tender.

- **Bidders are not allowed to communicate directly with any other person regarding this bid other than the procurement official/s. Failure to comply with this requirement may lead to your bid being disqualified.**
- Bidders must strictly avoid conflicts with other assignments or their own interests. Bidders found to have a conflict of interest shall be disqualified. Without limitation on the generality of the above, Bidders, and any of their affiliates, shall be considered to have a conflict of interest with one or more parties in this EOI and tender process, if they:
 - a) are or have been associated in the past, with a firm or any of its affiliates which have been engaged by GIZ or the Interim Supply Chain Management Council to provide services for the preparation of the design, specifications, Terms of Reference, cost analysis/estimation, and other documents to be used for the procurement of the services in this selection process;
 - b) were involved in the preparation and/or design of the programme/project related to the services requested under this EOI and tender;
 - c) are serving or have been serving in the past three months in the structures of the Interim Supply Chain Management; or
 - d) are found to be in conflict for any other reason, as may be established by, or at the discretion of GIZ.

Scientific data

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

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