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



Support to the Presidential Youth Employment Intervention (S2PYEI)Project number Provision of communication and creative services in support cost centre:

of the PYEI

20.2210.1-001.00

0.	List of abbreviations	2
1.	Context	3
2.	Tasks to be performed by the bidder	3
3.	Technical-methodological concept	6 6 6 6
4.	Personnel concept	7 8
5.	Costing requirements  5.1. Assignment of experts and working days  5.2. Travel  5.3. Workshops, training  5.4. Equipment  5.5. Other costs  5.6. Flexible remuneration  5.7. Note on General Terms and Conditions	9 10 11 11
6.	Inputs of GIZ or other actors	12
7.	Requirements on the format of the bid	12
8.	Option	12
9.	Annexes1	



# 0. List of abbreviations

BMZ German Federal Ministry for Economic Cooperation and Development

GIZ Deutsche Gesellschaft für Internationale Zusammenarbeit

GTCC General Terms and Conditions of Contract

PMO Project Management Office

PYEI Presidential Youth Employment Intervention

S2PYEI Support to the Presidential Youth Employment Intervention project

ToR Terms of reference



#### 1. Context

South African President Cyril Ramaphosa launched the Presidential Youth Employment Intervention (PYEI) in 2020 to address the persistent challenge of high youth unemployment in the country. Through a mix of demand- and supply-side interventions, the PYEI aims to design, accelerate, and enhance programmes that create opportunities for young people in South Africa to access the labour market, address skills gaps and contribute to economic growth and stability. The PYEI is implemented through a coordinated, multi-sectoral approach and seeks to streamline the efforts of multiple stakeholders in public, private and other non-governmental sectors towards common objectives. Find more information on the PYEI at <a href="https://www.stateofthenation.gov.za">www.stateofthenation.gov.za</a>.

On behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), the *Deutsche Gesellschaft für Internationale Zusammenarbeit* (GIZ) implements the project *Support to the Presidential Youth Employment Intervention* (S2PYEI). The purpose of the S2PYEI is to assist The Presidency in achieving the interventions' goals. This includes aspects of technical, administrative and implementation support.

As a multi-sectoral and multi-stakeholder initiative with high visibility, effective communication among internal actors, with external stakeholders, and with the interested public is central to programme success.

Against this background, the S2PYEI project seeks the services of a communication service provider to support the Project Management Office (PMO) in The Presidency in developing and delivering effective communication activities for the PYEI.

# 2. Tasks to be performed by the bidder

The bidder is responsible for providing the services and tasks described below. These will be spread across the entire contract period with activities focusing on specific key moments throughout the year, such as Youth Month (June), the State of the Nation address (February) or releases of quarterly labour force statistical data. Detailed creative briefs will be developed during the contract to provide specific information on needs and to agree on the number of expert days require for performance of tasks.

## A. Strategy

The bidder will work with The Presidency and S2PYEI project in developing and/or evolving the PYEI communication strategy. While the final scope of strategic work to be performed will depend on progress made in the strategic process by the time of contracting, the following activities will be performed:

- A.1. Conceptualisation and delivery of up to two strategy sessions with identified key stakeholders (strategy group of ca.15 participants). This will be based on an initial briefing session, build on existing analytics and be implemented in close cooperation with the S2PYEI communication team.
- A.2. With results from these engagements, formulation of **a detailed strategy document** that defines communication priorities, objectives, definition of target audiences and audience-specific messages, channels, key success measures as well as clear definitions of synergies with concurrent, related communication activities.
- A.3. This should be complemented by a detailed **communication plan for a 12-month period**. This plan should define planned activities and content, clarify the roles and



- responsibilities of different actors implementing communication activities and include a plan for communication monitoring for results.
- A.4. Packaging of strategy and communication plan into **one accessible summary document and a presentation** that will be used to brief key stakeholders in the PYEI and related programmes in the Presidency.
- A.5. Technical lead of **an annual review of the communication strategy**, including review of results and implications for further implementation. This will include the preparation and implementation of a half-day workshop with communication leads as well as reporting and the development of recommendations. This task will be implemented in close collaboration with the communication teams at GIZ/The Presidency.

The contractor should accommodate **up to 25 relevant expert days** to deliver the services above.

# B. Concept and Copy

The bidder will lead the conceptual and creative development for various communication products in support of this strategy and based on detailed creative briefings and source content provided by The Presidency and/or the S2PYEI project. These may include:

- B.1. Copy and conceptual **support to the development of up to 16 documents** (also see C.1). This will include treatment and adaptation of core content provided by communication teams at GIZ/The Presidency.
- B.2. Concept and copy for up to two animated explainer videos (see C.5) on the PYEI and its impact.
- B.3. **Update of website copy** within the context of quarterly updates and one full rework (see D.5).

Additional conceptual and copy requirements can be found under D (Social Media/Web Content). The contractor should accommodate up to **35 relevant expert days** to deliver the services

## C. Design and visuals

The contractor will provide graphic design services as well as services relating to the production of visuals (photography, illustrations). This will adhere to existing design and branding guidelines, contribute to strategic objectives of the PYEI and include:

- C.1. **Design and layout of up to 16 documents**, including a mix or longer formats (such as reports) and shorter documents such as fact-sheets as well as a quarterly newsletter.
- C.2. Production of **informational graphics/posters** (including adaptations per graphic for various uses and media)
- C.3. Production of **up to 30 photographs**, including logistics and preparatory work, professional fees including for art direction, photographers, models/talent and support staff, potential site-related fees and transfer or rights/unlimited rights of use as per General Terms and Conditions of Contract (GTCC).
- C.4. Design support for branding and display materials for use in events/workshops such as posters, displays, presentations, simple leaflets. Please include a fixed budget for the procurement of event/workshop related equipment and materials as indicated in the costing section (5.4.).



C.5. Design and animation for two **30-60 second animated video explainers** on the PYEI and key results.

The contractor should accommodate 90 relevant expert days to deliver these services.

#### D. Social media and web content

The contractor will support the development of targeted social media content and activities for dissemination by communication teams in The Presidency and other PYEI lead departments. The bidder will lead the further creative evolution of the PYEI microsite.

Specifically, the contractor will be responsible for:

Α.

- D.1. Within the framework of the overall communication strategy, development of a **digital media engagement plan for the PYEI** which optimises utilization of key channels, increases visibility and a cohesive image and supports key messaging with priority audiences.
- D.2. Implementation of the plan through development and delivery of agreed quarterly digital media plans. This should also include performance analysis of digital content and products and tracking of key metrics in quarterly reports.
- D.3. **Media buying services** throughout the contract period. The focus will be on selected, highly targeted content. It may also cover costs associated with Search Engine Marketing (SEM). Please include a fixed budget for the procurement of media/paid content equipment as indicated in the costing section under 5.5.
- D.4. Creation of **social media content posts** (with adaptations to multiple platforms such as Twitter, Instagram, Facebook, LinkedIn and websites), including copy, graphics/photographs or animated/video content. The bidder may draw on content produced as part of the activities above but will also be asked to provide resources for additional production (research, concept, copy, visuals).
- D.5. During the contract period, **one full revision of the PYEI microsite**, which may include an improved conceptual approach. The overall scope of the site will remain similar to the existing PYEI microsite at <a href="https://www.stateofthenation.gov.za">www.stateofthenation.gov.za</a>. The contractor will lead the creative (concept, design, copy, UI) as well as the technical realization (including aspects of Search Engine Optimisation) to the extent that it is not covered by a third-party service provider contracted concurrently by The Presidency.

The contractor should accommodate **75 relevant expert days** to deliver these services.

**E.** Throughout the period of assignment, the bidder will provide **4 brief quarterly reports** (3-6 pages) that summarise all activities performed, expert days used, deliverables produced and, where applicable, reports on results of the implementation of media strategies.

The bidder should accommodate relevant 5 relevant expert days to deliver these services.

Milestones to be achieved by certain dates during the contract term are:

Milestone	Deadline/place/person responsible
Annual workplan	Within 5 weeks after commencement of
	contract



First quarterly report on activities performed and deliverables produced	Within 14 weeks after commencement of contract
Second quarterly report on activities performed and deliverables produced (including on key moment Youth Month in June)	Within 26 weeks after commencement of contract
Third quarterly report on activities performed and deliverables produced (including on key moment Women's Month in June)	Within 38 weeks after commencement of contract
Final report on activities performed and deliverables produced; final submission of all deliverables	By end of contract term

Intended period of assignment: From 20 January 2023 until 29 February 2024 (main service period). The option may cover an additional period until 31 December 2024.

## 3. Technical-methodological concept

# 3.1. Strategy

Bidders are asked to briefly **reflect on the objectives** of the ToR and **outline the overall strategy to be taken** in delivering the stated outputs (Assessment grid lines 1.1.1. and 1.1.2.).

## 3.2. Cooperation

Not applicable

#### 3.3. Steering structure

Please see 3.6.

#### 3.4. Processes

Bidders are required to include a description of **the key processes** (1.4.1) that will be taken for services such as strategy, design and creative development and digital communication. This will include an outline of anticipated work steps envisaged to achieve stated objectives.

# 3.5. Learning and innovation

Not applicable

## 3.6. Steering structure and project management of the contractor

The submission has to include a **section on a proposed project management** approach that will enable timely delivery of outputs. This should consider that the contractor will have to manage the inputs of the S2PYEI project as contracting party as well as of The Presidency and PYEI lead departments as final recipients of the services. Bidders are also required to



consider the collaboration with other technical service providers (1.3.1/1.6.1.) contracted through The Presidency, such as those managing the PYEI microsite. It should aim to reduce undue meeting and consultation demands especially on The Presidency while securing opportunities to provide meaningful input at key points in the process.

The bidder is required to present **briefing and reporting processes** (1.6.1.) that allows for effective allocation of expert days and timely delivery of outputs. This includes suggestions on quarterly reporting processes and task assignments and a brief description on how **results monitoring for media performance** (1.3.2.) will be handled.

The bidder is required to draw up a **personnel assignment plan** (1.6.2.) with explanatory notes that lists all the experts proposed in the bid; the plan clearly describes the roles and responsibilities of the experts proposed in the personnel concept, including those in the expert pool.

#### 3.7. Further criteria

Bids should provide **learning and participation activities for young people** (e.g. as team members or through paid internships). Such opportunities for young people should be briefly described (1.7.).

## 4. Personnel concept

This bid is open to registered design and creative service providers with the required capacities and competences. The bidder is required to propose staff for the positions ('experts') described here in to perform the tasks described above. The qualifications specified below represent the requirements to reach the maximum number of points in the personnel assessment (numbering relates to line items in the assessment grid). These will be scored on the basis of:

1) up-to-date CV's for all proposed team member(s) and 2) work samples as specified below

#### 4.1. Team leader: Creative and Project Lead

## Tasks of the Team Leader

- Creative lead and overall responsibility for service delivery of the bidder (quality, reporting, meeting deadlines, contract management) according to agreed creative briefs specifying tasks described above.
- Coordinating and ensuring communication with GIZ, partners and others involved in the project (especially The Presidency and PYEI lead departments)
- Personnel management, e.g. identifying the need for short-term assignments within the available budget, as well as planning and steering assignments

#### Qualifications of the Team Leader

- Education/training (2.1.1): post-secondary qualification (University or other) in Communication, Marketing or another field relevant to this assignment
- Language (2.1.2): Excellent written and oral language skills in English (C2 in the Common European Framework of References for Languages)
- General professional experience (2.1.3): 10 years of professional experience in managing projects in the field of communication
- Specific professional experience (2.1.4): 5 years' experience in creative direction of complex communication projects (please provide 2 work samples)



- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company (can overlap with 2.1.3)
- Development Cooperation (DC) experience (2.1.7): Previous and recent (in the last 36 months) experience in working for clients in the public/government, development or not-for-profit sector
- Other (2.1.8): 3 years' experience in developing and implementing communication strategies

## 4.2. Expert 1: Design Lead

## Tasks of the Design Lead

- Lead and direct on all design/studio elements of the contract
- Support communication with GIZ, partners and others involved in the project (especially The Presidency and PYEI lead departments)
- Personnel management and art direction for other relevant experts (photography, illustration, animation) within allocated budgets and according to creative briefs

## Qualifications Design Lead

- Education/training (2.2.1): post-secondary qualification (University or other) in Design, Visual Communication, Fine Arts or another field relevant to this assignment
- Language (2.2.2): Good business language skills in English (C1 in the Common European Framework of References for Languages)
- General professional experience (2.2.3): 5 years professional experience in managing projects in the field of communication (art direction, please provide 2 work samples)
- Specific general experience (2.2.4): 10 years professional experience in design and visual communication, including design for online platforms (can overlap with 2.2.3)
- Leadership/management experience (2.2.5): 3 years of management/leadership
- Development cooperation experience (2.2.7): Previous and recent (in the last 36 months) experience in working for clients in the public/government, development or not-for-profit sector
- Other (2.2.8): Documented experience in developing information graphics and/or animated explainers translating complex issues in accessible visual content (please provide 2 work samples)

## 4.3. Expert 2: Digital Communication Expert

#### Tasks of the Digital Communication Expert

- Lead and direct on all digital communication elements of the contract
- Support communication with GIZ, partners and others involved in the project (especially The Presidency and PYEI lead departments)
- Personnel management and art direction for all other relevant experts (media buying/analytics, design for web and digital media) within allocated budgets and according to creative briefs

## **Qualifications Digital Communication Expert**

- Education/training (2.3.1): post-secondary qualification (University or other) in Design, Communication or another field relevant to this assignment
- Language (2.3.2): Good business language skills in English (C1 in the Common European Framework of References for Languages)
- General professional experience (2.3.3): 5 years professional experience in leading digital communication projects (please provide 2 work samples)



- Specific general experience (2.3.4): 3 years professional experience in developing, implementing and tracking strategies and content for social media (can overlap with 2.3.3)
- Development cooperation experience (2.3.7): Previous and recent (in the last 36 months) experience in working for clients in the public/government, development or not-for-profit sector
- Other (2.3.8): Documented experience in conceptualising websites (please provide 1 work

## 4.4. Expert pool with 2 to 5 experts.

## Tasks of the short-term expert pool

- Support the team leader and design lead in the delivery of creative communication services outlined in these ToR (e.g., copy, layout/illustration, photography, animation, web design/development)
- Support contract and administrative management related to these activities, including client management, production management, media buying and reporting).
- Preparation, facilitation and documentation of workshops
- Web-design/development and programming

## Qualifications of the short-term expert pool

- Education/training (2.6.1): 2 experts with relevant post-secondary education (diploma/bachelor's/masters) in communication, design, visual arts, web design, photography or allied field.
- Language (2.6.2): expert for writing/copy with very good language skills in English (C1), good language skills (C2) in English and one other South African language required for all other experts
- General professional experience (2.6.3): all experts with 3 years of work experience in their specific field of expertise (writing, production management, client service, design/layout/illustration/animation, photography, website development).
- Specific professional experience (2.6.4): 1 expert with 5 years of experience in writing for media (copy, journalism).

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

## 5. Costing requirements

The scope of work (expert days, fixed budgets) described in these ToR constitutes an upper ceiling and payments will be made against evidence on actual services rendered. Costs for the main contract term and the optional contract period need to be reflected separately.

#### 5.1. Assignment of experts and working days

This contract makes provision for a total of 230 working days (plus an additional 35 working days as part of the option - see 8) to be delivered by the experts listed above (see 4.)

#### This includes

• 44 (6) for the optional period) days for Team Lead



- 66 (9) days for the Expert 2: Design Lead
- 40 (5) for the Expert 3: Digital Communication Expert
- 80 (15) days for the Expert pool.

In your submission, please do not deviate from the specification of total expert days because this is part of the competitive tender and is used to ensure that the tenders can be compared objectively. Please clearly allocate the different expert days to the task areas above in ways best suited to deliver the said services. You can draw on the suggested amounts of expert days suggested in the task areas under 2. These are to be understood as guidelines for anticipated scopes of work and slight deviations are possible.

#### 5.2. 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.

Please include travel cost for a total of five (5) trips (two experts) to and from Pretoria/Johannesburg. Four (4) of these should be included in the costing for the main period. One additional trip to be included in the period for the optional extension

The costs are reimbursed in accordance with the country table in the GIZ travel expenses guidelines as a lump sum (per-diem allowances and accommodation allowances up to the highest rates under tax law for the country in question) or on submission of documentary proof (accommodation costs which exceed this up to an appropriate amount, the cost of flights and other forms of transport). All business travel must be agreed in advance by the officer responsible for the project. Travel expenses must be kept as low as possible.

Please also see information on travel expenses in the price sheet.

## 5.3. Workshops, training

The bidder implements up to three workshops for strategy development, planning and/or review.

A workshop budget of ZAR 90,000 should be included in the costing. The full amount is to be included in the costing for the main contract period, no workshops are planned for the optional extension period.

The fixed, unalterable budget given above is specified in the price schedule for workshops. The budget includes the following costs relating to the planning and running of workshops:



- Room hire
- Technical systems
- Moderation services
- Translation/interpreting
- Catering
- Workshop materials
- Other costs relating to the workshops

Wherever possible, the participating organisations shall cover these above items as their contribution to the joint activities. The workshop budget indicated above is to cover costs for such items where the organisation is unable to provide them.

The budget does not include the fees and travel expenses for the contractor's experts incurred in connection with the planning and running of the workshops. These are covered under 5.2.

## 5.4. Equipment

A budget of ZAR 100,000 for the procurement of event and workshop related equipment should be included. The full amount is to be included in the costing for the main contract period, no workshops are planned for the optional extension period.

The fixed, unalterable budget above is earmarked for the procurement of workshop and moderation equipment.

#### 5.5. Other costs

Please include a fixed budget of ZAR 250,000 in your calculation for paid media/content (see 2., D). This may be drawn down based on agreed media plans during the contract duration.

The fixed, unalterable budget given above is earmarked in the price schedule for paid media placements.

#### **5.6.** Flexible remuneration

The budget for flexible remuneration is ZAR 300,000. ZAR 225,000 thereof are to be included in the costing for the main contract period while ZAR 75,000 should be included in the option.

The fixed, unalterable budget given above is earmarked in the price schedule for flexible remuneration. Flexible remuneration is intended to facilitate the flexible management of the contract by the officer responsible for the commission at GIZ. The bidder can make use of the funds in accordance with the GTCC.

## 5.7. Note on General Terms and Conditions

We attach our General Terms and Conditions of Contract. These contain detailed information on contract terms, including on issues of rights of use, invoicing and payments, reporting and travel.

Our GTCC will not be changed/amended and will form part of the contract should you be the winner of this bid. By submitting your proposal, we will conclude that you have read and accepted these terms and conditions.

# 6. Inputs of GIZ or other actors

GIZ and/or other actors (e.g. The Presidency) are expected to make the following available:

- Relevant design templates and resources (logos etc.) as required for tasks
- Facilitate contacts to relevant stakeholders and partners
- Contribute additional source content (e.g. project photographs, texts) for some media products

## 7. Requirements on the format of the bid

The structure of the bid must correspond to the structure of the ToR. In particular, the detailed structure of the technical-methodological concept (see 3) is to be organised in accordance with the positively weighted (not with zero) criteria in the assessment grid. It must be legible (font size 11 or larger) and clearly formulated. The bid is drawn up in English.

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

The CVs of the personnel proposed in accordance with Chapter 4 of the ToR must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages. A maximum total of 8 additional pages and can be added to provide work samples. The CVs must clearly show the position and job the proposed person held in the reference project and for how long.

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 costing requirements. In the contract the bidder 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.

#### 8. Option

After the tasks put out to tender have been completed, important elements of these tasks can be continued or extended within the framework of a follow-on assignment. The option may cover an extended contract period up to 31 December 2024. Individual points:

- Type and scope: The duration and scope of the contract can be extended by a maximum total of 35 expert days to continue service delivery within the task areas described under 2. for a longer period of time.
- 2. **Requirements:** If GIZ's commissioning party extends the project term of the S2PYEI and local partners are satisfied with the services delivered.

The option is exercised in the form of an extension to the contract based on the already offered individual rates. Days covering the option are part of the overall costing but need to be reflected separately.



#### 9. Annexes

GIZ South Africa General Terms and Conditions of Contract

## 6. Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA\_Quotation@giz.de no later than 12<sup>th</sup> December 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.
- Above-mentioned budgets for workshop and Flexible Remuneration must be added to your costing.
- 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.