

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

MS EXCEL DATA ANALYSIS TRAINING	Project number/ cost centre: 20.2210.1-001.00
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0. List of abbreviations

AG	Commissioning party
BMZ	German Federal Ministry for Economic Cooperation and Development
CEFRL	Common European Framework of Reference for Languages
CV	Curriculum vitae
M&E	Monitoring and Evaluation
MS	Microsoft
PYEI	Presidential Youth Employment Intervention
S2PYEI	Support to the Presidential Youth Employment Intervention
ToRs	Terms of reference

1. Context

Project description

On behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH implements the project “Support to the Presidential Youth Employment Intervention (S2PYEI)”. The project supports the Presidency of the Republic of South Africa in the coordination and implementation of the PYEI.

Problem analysis

South Africa has an intolerably high unemployment rate. Young people in particular struggle to enter the labour market – a development which has been further exacerbated by the COVID-19 pandemic. In response to this challenge, the President of the Republic of South Africa has established the Presidential Youth Employment Intervention (PYEI).

To measure the impact of the PYEI, a sophisticated system for Monitoring and Evaluation (M&E) has been developed. Some of the funding mechanisms under the PYEI heavily relies on MS Excel sheets for their data collection, analysis and reporting. In order to implement the PYEI M&E system and the projects under its funding mechanisms effectively, key staff in implementing organisations need intermediary or advanced level of skills in using MS Excel.

Project approach

S2PYEI supports the Presidency in the coordination and implementation of the PYEI and strengthens the capacities of PYEI implementing organisations. S2PYEI therefore seeks to strengthen the MS Excel data analysis skills of staff in selected governmental and civil society organisations in the context of the PYEI.

2. Tasks to be performed by the contractor

The contractor is responsible for providing four MS Excel data analysis courses with up to 20 participants each. The courses must aim at enabling the participants to work with the MS Excel tools used for data collection and analysis in the context of the PYEI.

The courses must cover the following content:

- Data cleaning and manipulation
- VLookUp and HLookUp functions
- Working with pivot tables
- Formula auditing
- Statistical functions
 - Means, Modes, and Medians
 - Min Max
 - Finding Values, Ranks, and Percentiles
 - Standard Deviations and Variances
 - Normal Distributions
- Descriptive statistics
 - Using the Excel Analysis tool pack
 - Ranking by Percentile
 - Calculating Moving Averages

- Exponential Smoothing
- Inferential statistics
 - Using the t-test Data Analysis Tool
 - Performing z-test Calculations
 - Using the Correlation Analysis Tool
 - Using the Regression Data Analysis Tool
 - Using the Covariance Analysis Tool
 - Using the ANOVA Data Analysis Tools

The contractor will introduce the MS Excel tools used under the PYEI in the training and give participants an opportunity to practice their new skills on these tools.

The contractor will provide the content in courses of up to 20 hours on consecutive days. Three courses will be offered virtually, while one will be offered in-person in Johannesburg. The exact dates for the courses will be set in agreement between GIZ and the contractor at the beginning of the contract.

For virtual courses, the contractor will provide GIZ with information for the participants that will inform them of the technical requirements for participation, as well as the link and time as well as any other information they require to access the course, at least one week before the start of the course. For the in-person training, the contractor will provide GIZ with the place, date and time of the training as well as any information relevant for accessing the location at least one month before the start of the course.

GIZ will invite the participants and make the list of participants available to the contractor. The contractor will keep daily attendance sheets and submit these to GIZ after the end of each training.

The contractor is responsible for assuring smooth implementation of the training uninterrupted by e.g. power cuts.

The contractor will be responsible for submitting a close-out report. The report will detail the process of training including challenges and activities, a report on pre and post training results which details change in skills, the total number of those who completed the training and the reasons for non-completion.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Deadline/place/person responsible
Course 1 (virtual)	July 2023
Course 2 (virtual)	August 2023
Course 3 (in-person, in Johannesburg)	September 2023
Course 4 (virtual)	September 2023
Course 5 (virtual)	October 2023
Submission of close-out report	31 October 2023

Period of assignment: from **15 July 2023** until **31st October 2023**.

3. Concept

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

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1).

The tenderer is required to describe the key **processes** for the services for which it is responsible (1.4.1). This will consist of a course outline including a detailed description of the content that will be covered under the course, as well as a description of the methodologies deployed and capacities of the contractor to implement the training courses.

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Short-term expert pool with minimum 2, maximum 3 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

- Design and implement the training courses
- Communicate with GIZ regarding the logistical arrangements
- Keep lists of attendance and submit them to GIZ

Qualifications of the short-term expert pool

- Education/training (2.6.1): All experts with university qualification (Bachelor) in Computer Science, Data science or another relevant field
- Language (2.6.2): All experts with C1 level language proficiency in English according to the Common European Framework of Reference for Languages (CEFR)
- General professional experience (2.6.3): None
- Specific professional experience (2.6.4): All experts with 3 years of experience in delivering training programs for MS Excel, or alternatively a record of having delivered 20 MS Excel trainings
- Regional experience (2.6.5): None
- Development cooperation (DC) experience (2.6.6): None
- Other (2.6.7): The team must include at least one woman

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

5. Costing requirements

Assignment of personnel and travel expenses

Per-diem and overnight accommodation allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable at <https://www.bundesfinanzministerium.de>).

Accommodation costs which exceed this up to a reasonable amount and the cost of flights and other main forms of transport can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Designation of short-term expert pool	2	15	30	
Travel expenses	Quantity	Price	Total	Comments
Fixed travel budget	1	R20 000	R20 000	A budget is earmarked for travel to Johannesburg. Against provision of evidence. Include the amount on your budget
Other costs	Number	Price	Total	Comments
Workshops				Please calculate a budget for workshops taking the following cost items into account: Venue hire, catering, license or other costs related to the workshops
Other costs				The budget contains the following costs Administration.

Payment

The contractor will submit one invoice after the completion of the contract. The contractor will use timesheets to account for the performance.

Workshops and training

The contractor implements the following training courses:

- Four virtual 20-hour training courses as described in Chapter 2 above
- One in-person 20-hour training course as described in Chapter 2. For this course, the contractor will provide a suitable venue including the technical equipment required, as well as catering (coffee, tea, lunch)

6. Inputs of GIZ or other actors

GIZ is expected to make the following available:

- Provide examples of the MS Excel tools used under the PYEI
- Refer the selected participants to the contractor

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 5 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

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 each. They 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).

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

Other Requirements

- Please submit your proposal (technical and price proposal) in separate files/folder to ZA_Quotation@giz.de no later than **09 June 2023** 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.**