

UNICEF South Africa Evaluation Terms of Reference

Summary

Type of Contract	Institutional	x	Individual	
Title of the Evaluation	Impact Evaluation of the foundational learning Remediation Programme: The early Grade Reading Programme			
Purpose	The impact evaluation of the second iteration of the Early Grade Reading Programme (EGRP II) in Northern Cape is being conducted at this stage of the intervention to understand the impact, fidelity, and sustainability of the intervention to provide evidence to the Department of Basic Education for further scale up.			
Objectives	To conduct a randomized control trial in conjunction with existing system data to understand the impact of the Early Grade Reading Programme in the Northern Cape in mono and multigrade classrooms in the intervention. The process will also support to improve national systems level data by highlighting gaps and weaknesses that need to be strengthened over the duration of the programme.			
Location	South Africa, Northern Cape province, Frances Baard and John Taolo Gaetsewe Districts.			
Duration	20 Months			
Start Date	1 May 2024			
Commissioning Office	UNICEF South Africa			
Application link	https://www.unicef.org/southafrica/procurement			

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Terms of Reference

Impact Evaluation of the foundational learning Remediation Programme: The early Grade Reading Programme in South Africa (2024-2025)

1. Background

I. Context

There are 13 million children in schools, making up approximately 22% of the South African population. Approximately 95% of children are in public school and only 5% are in private schools (School Realities, 2019). The majority of public schools are non-fee charging, quintile 1 to 3 schools. Table 1 below provides a summary of the schooling system. The identified province for the Early Grade Reading Programme (EGRP) 2 is Northern Cape highlighted in yellow below.

Table 1: Number of learners, in public schools per province in 2022

Province	PUBLIC		
	Learners	Educators	Schools
Eastern Cape	1 751 496	57 509	5 046
Free State	707 664	23 114	946
Gauteng	2 254 391	71 966	2 056
KwaZulu- Natal	2 822 526	91 298	5 801
Limpopo	1 715 130	50 599	3 646
Mpumalanga	1 109 466	35 119	1 649
Northern Cape	299 014	10 127	545
North West	847 044	27 232	1 448
Western Cape	1 178 155	38 662	1 452
Total	12 684 886	405 626	22 589

Source: Department of Basic Education (2022). School realities 2022. Pretoria, Republic of South Africa. EMIS statistical publications. Accessed on 19 January 2023 from <https://www.education.gov.za/Programmes/EMIS/StatisticalPublications.aspx>

While the South African education system has steadily improved learning outcomes over the past two decades, this has been off a low base. The 2022 Progress in International Reading Literacy Study (PIRLS) shows that 81% of Grade 4 learners do not read for meaning. This aligns with the poorest 80% of schools in South Africa.

Before the pandemic, we already knew that one of the strongest predictors of children dropping out of the education system is poor learning foundations, and we have now begun to see significant learning losses amongst learners in South Africa. When considering the negative impact of the pandemic we should consider both lost learning time and learning losses. South African schools lost 54% of contact time in 2020 and 22% lost in 2021 due to absenteeism and rotation. This was much higher for the foundation phase which lost up to 65% of school contact time due to rotational attendance policies.

The Department of Basic Education (DBE), through its Early Grade Reading Studies (EGRS), was able to collect data on reading outcomes for children before and during the pandemic. This has allowed a comparison between the amount of reading improvement that usually happens during the course of a normal year with what children learned during 2020. At the foundation phase, the estimated learning losses during 2020 were up to 75% of a year of learning at the Grade 3 level. This was found in typical quintile 1 to 3 schools, which represent the majority of schools.

These learning losses in the early grades present a serious long-term threat for the children affected. The gaps in learning and mastering basic skills that would have been taught firstly in the Foundation Phase but across all phases, should receive urgent attention to prevent later dropout in the years to come. South Africa already had a dropout problem (although it had been consistently improving over the years) and this was caused largely by weak learning foundations that presents a need to implement evidence-based programmes to improve the overall quality of learning and teaching in key early learning areas: ECD opportunities, reading and literacy in the home languages, and numeracy.

The Department of Basic Education (DBE) has been conducting research into the acquisition of reading through the Early Grade Reading Studies (EGRS) and Reading Support Project (RSP), across two provinces since 2015. The EGRS are impact evaluations aimed to provide this evidence in an iterative manner, with each study responding to existing and emerging research questions. Overall, these studies aim to systematically provide evidence on alternative models of teacher support for the teaching of reading. The lessons from EGRS are as follows:

- A structured learning programme with integrated materials and coaching can impact early grade reading significantly. After two years of intervention, learners in the coaching intervention gained 40% of a year of learning.
- Foundation Phase interventions have a persistent impact. The original cohort of learners were assessed in Grade 4 and Grade 7, and they had retained the initial impact.
- Priority should be given to Home Language, with English added as a second language.
- In person coaching is most effective. Enhancement may include virtual aspects however a strong in-person model should be the base.

More information on the EGRS designs and findings of the evaluation reports is available on the DBE website.

The first Early Grade Reading Programme was implemented from 2021 and will continue until the end of 2023. This intervention leverages off the success evidenced by previous EGRS. Using the same model, with the addition of Departmental Heads being trained and supported to be coaches.

The second Early Grade Reading Programme (EGRP II) is the latest study in the EGRS. The intervention is based on the provision of lesson plans, integrated materials and up-front training and coaching. This new iteration will include intervening in both multigrade and monograde classrooms in the John Taolo Gaetsewe and Frances Baard districts in the Northern Cape Province. It has been co-developed collaboratively by the Curriculum Implementation & Quality Improvement (GET) directorate Research Coordination Monitoring and Evaluation (RCME) directorate of the DBE. Strategic support has been received from UNICEF South Africa and Zenex Foundation.

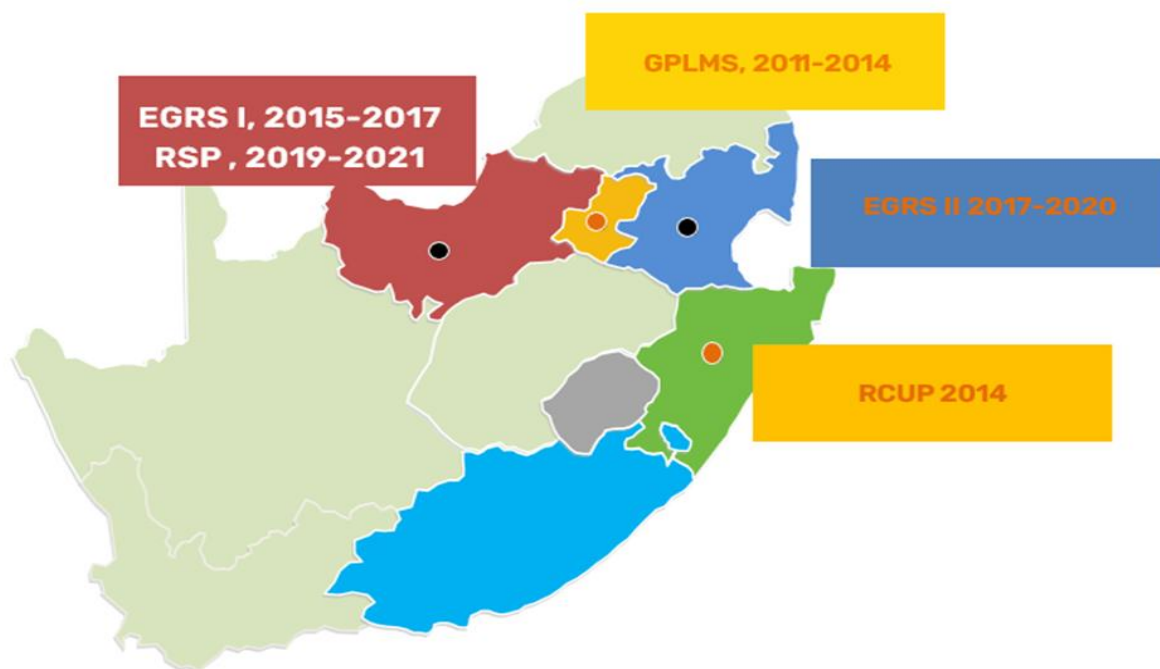
Background information and technical implementation reports of the Early Grade Reading Studies (EGRS I and EGRS II) are available on the DBE website. Prospective bidders are encouraged to visit the DBE's website for more information on the EGRS at: <https://www.education.gov.za/Programmes/EarlyGradeReadingStudy.aspx>

The Early Grade Reading Programme builds on existing structured pedagogy programmes implemented internationally and in South Africa. In this section, we describe reading interventions developed and implemented in South Africa as well as their effectiveness.

The DBE has led 10 years of Early Grade Reading Studies (EGRS) in 5 randomised control trials (RCTs). A Structured Learning Programme with lesson plans, integrated reading material and coaching has been developed and tested. This proposed programme builds on this experience and knowledge to iterate and learn additional lessons and models for systemic implementation as well as the scale-up of known evidence-based intervention. The main lesson is that to improve literacy levels, SA should invest in teachers. This is because one-on-one coaching for teachers has proved to be the most effective reading intervention. Based on the EGRS studies, a home language intervention in the Foundation Phase is recommended, as it will have a positive impact on home language and English as First Additional language (EFAL).

Overall EGRS studies have been conducted in 650 schools across two provinces and 5 districts out of a total of 9 provinces and 83 districts. This excludes scaling up by NGOs based on EGRS lessons and the preceding studies informing EGRS, namely RCUP and Gauteng PLMS as shown in figure 1 below.

Figure 1: Map of the districts where EGRS has been scaled up.



The four main EGRS series has been implemented as shown in Table 2 below with the latter part of the table providing the proposed scale-up through EGRP II in Northern Cape.

Table 2: EGRS interventions 2015 to 2023; Extension 2023-2027

Intervention	Beneficiaries	School and context description	Geographic location
Early Grade Reading Study I (2015-2017)	230 schools	Pupil-teacher ratio is 1:38 with a total of 187 average number of learners in the Foundation Phase (Grade 1 to 3).	Dr Kenneth Kaunda District
Extended to the Reading Support Programme (2019-2020)	Foundation phase teachers		Ngaka Modiri Molema District, North West Province
	Grade 1 to 3 learners		Rural province
	Approx. 43 010 learners	The average class size is 41 learners with the largest classes having 80 learners.	65% of school principals classified their schools as rural
	47% female learners	71% of parents had not completed Grade 12 and 50%	

		of them are employed	
Early Grade Reading Study II (2017-2019)	180 schools Foundation Phase teachers Grade 1 to 3 learners 22 800 with 7600 reached on average per grade. Approximately 46% female learners	56% of parents had not completed Grade 12.	Gert Sibande District Ehlanzeni District Mpumalanga 74% of schools classify their location as remote rural
Early Grade Reading Programme (2021-2023)	140 schools 828 Foundation Phase teachers Grade 1 to 3 learners Approximately 48% female learners	Only 68% of parents had completed Grade 12 Only 18% of parents reportedly employed	Dr Ruth Seipati Mompoti district, North West Province 76% of schools classified themselves as rural.
EGRP II			
Phase 1 Early Grade Reading Programme II (2024-2025)	In 118 schools Foundation phase teachers – average of 840 (6 teachers per school) Implementing the Foundation Phase, grades 1 – 3.	All schools in the intervention are quintile 1-3 primary schools with Setswana as Language of Learning and Teaching. And English as First Additional Language.	Frances Baard and John Taolo Gaetsewe Districts
Phase 2 Early Grade Reading Programme II (2026-2027)	In 198 schools with Foundation phase teachers – average of 1207	All schools in the intervention are quintile 1-3 primary schools with Afrikaans, isiXhosa and English as Language of Learning and Teaching. And those	Namakwa, Pixley-ka-Seme, and Zf Mgcawu Districts.

		with Afrikaans as First Additional Language	
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2.1 Evidence of effectiveness

The First Early Grade Study (EGRS I) commenced in 2015 – 2017 by working in 230 quintiles 1-3 schools (no-fee schools catering for the most disadvantaged learners) in the North West province (districts of Ngaka Modiri Molema and Dr Kenneth Kaunda). Three different interventions targeted at Grade 1 in 2015, Grade 2 in 2016 and Grade 3 in 2017 were implemented. All of these interventions aimed to improve the learning and teaching of Setswana home language literacy in the Foundation Phase. The main question here was finding out if any of these interventions had an impact and whether an enhanced version of the standard “centralised teacher training” often implemented by government worked as efficiently as in-person coaching.

After two years of implementation, formal impact evaluation results revealed that the basic programme of lesson plans, integrated reading materials and up-front training had positive effects on reading outcomes. The largest impact was observed when the form of professional support to teachers included on-site coaching, with learners who had received two years of the coaching intervention gaining 0.3*** standard deviations, approximately 40% of a year of learning ahead of the learners in the schools that received no intervention (control schools).

A follow-up data collection one year after the interventions had ended, found that the impacts on the original cohort of learners persisted into Grade 4. The magnitude of the advantage held by learners in the coaching group in 2018 was similar to that after two years of intervention, at 40% of a year of learning. Moreover, there was evidence of sustained change in teaching practice one year later, and this was leading to improved outcomes for the next cohort of learners. These results confirm that effective early interventions in reading can have benefits that last and can contribute to long-term improvements in educational outcomes.

Although coaching was found to have the highest impact, the cost of coaching and the availability of coaches in high numbers remained. Secondly, questions on the effectiveness of coaching in supporting English first additional language, one of the core subjects in Foundation Phase, remained unanswered.

The Second Early Grade Reading Study (EGRS II) was implemented in Mpumalanga in Grade 1 to 3, in 2017 to 2019, to measure the impact of the package of lesson plans, materials and coaching on English as First Additional Language (EFAL), and to investigate the use of electronic lesson plans and virtual coaching. Two versions of coaching were compared, the same on-site coaching from EGRS I as well as a version of virtual coaching. In the latter, the virtual coach could remotely support a larger number of teachers.

To assess whether the programmes were making a difference to learning outcomes, the same cohort of learners was assessed over three years, starting in February 2017 when they entered grade one, and ending in Grade 3 in November 2019. On-site coaching was more successful at improving English oral language proficiency and reading fluency than virtual coaching. Over the three years, on average, learners in the on-site coaching programme read 3 and a half words more than learners in the control group on an English oral reading fluency passage and managed to correctly identify 4 and a half words more in an English extended vocabulary assessment (about 21% more). In contrast, learners in the virtual coaching programme read the

same number of words correctly as learners in the control group and only correctly identified 2 and a half words more in the English vocabulary assessment. Both on-site coaching and virtual coaching were more effective at improving oral language proficiency than improving the somewhat more advanced skill of reading. Analysis of programme implementation suggests that the main reason for virtual coaching being less effective than on-site coaching was the modality of coaching, rather than the electronic lesson plans.

II. Object

This evaluation is undertaken to support to the Department of Basic Education's (DBE) second Early Grade Reading Programme (EGRP II). The programme is a reading improvement intervention that seeks to support the instruction of Setswana Home Language and English First Additional (EFAL) reading outcomes of Foundation Phase classrooms in the Northern Cape province of South Africa. It is jointly funded by the Bill and Melinda Gates Foundation, the United Nations Children's Fund South Africa (UNICEF-SA), Zenex Foundation and the Northern Cape Department of Education (NCDoE) in collaboration with the national DBE. The two-year intervention will roll out high-quality teacher professional development support across Grades 1 to 3 in all eligible Setswana Home Language instruction non-fee-paying primary schools of the Frances Baard and John Taolo Gaetsewe district from January 2024 through to December 2025.

There have been several initiatives and efforts to contribute to reading improvements including material development, advocacy and collaborations. However, there is growing recognition that teachers need support in implementing the curriculum, especially when it comes to teaching reading in the early grades. A large body of evidence suggests that teachers play a critical role—perhaps the most critical—in shaping how much a child learns in a year and his/her future productivity. Yet, across the world, teacher quality is highly variable.

In recognition of this, governments and donors invest billions of dollars annually with the hope of improving teaching practices of the existing pool of teachers - by some estimates the United States spends 18 billion annually on teacher professional development (Fryer, 2017)^[1]; and Popova, Evans and Arancibia (2016)^[2] calculate that nearly two thirds of World Bank-funded education programs include a professional development component - but with disappointing results. For example, many studies in the United States have found no impact of professional development programs on student learning, especially when conducted by government at scale; and a recent meta-analysis of evaluations of in-service teacher training programs in developing countries concluded that “teacher training programs vary enormously, both in their form and in their effectiveness” (Popova, Evans & Arancibia, 2016: 4).

South Africa (SA) has also been conducting similar research on effective teacher support interventions. The DBE has led 10 years of Early Grade Reading Studies (EGRS) in 5 randomised control trials (RCTs). Structured Learning Programmes with lesson plans, integrated reading material and various coaching models have been developed and tested. The main lesson is that to improve literacy levels, SA should invest in teachers with ongoing intensive support. This is because one-on-one coaching for teachers has proved to be part of the most effective reading intervention. Mechanisms for improving implementation of the curriculum consist of daily lesson plans, integrated home language reading materials, and

alternative forms of professional development support (on-site coaching, virtual coaching, just-in-time training). Based on the EGRS studies, a home language intervention in the Foundation Phase is recommended, as it will have a positive impact on home language and English as First Additional language (EFAL)

The effects of the pandemic on overall learning outcomes should also be in mind. This is in addition to pre-existing learning gaps across the education system. The DBE through EGRS was able to collect data on reading outcomes for children before and during the pandemic (2018 and 2020). At the foundation phase, the estimated learning losses during 2020 were 75% of a year of learning at the Grade 3 level. This was found in typical quintile 1 to 3 schools, which represent the majority of schools.

Addressing these learning losses and pre-existing gaps has provided a greater impetus to ensure that evidence-based reading programmes at scale. Such programmes should equip and supporting teachers in dealing with classrooms that are increasingly diverse in learning stages and support learning for the poorest performing learners. The Early Grade Reading Studies series meets these criteria.

The new generation of questions for evidence-building are as follows:

1. *How can we scale up implementation in a cost-effective way for all Setswana LOLT schools in a province at a district-wide scale?*
2. *How do we improve reading outcomes in the Home Language and English as a First Additional Language (EFAL) amongst learners in the Foundation Phase simultaneously*
3. *How do you develop, integrate and deliver the EGRS package with coaching in both monograde and multigrade classrooms?*

The proposed second iteration of the **EGRP** is an integrated response to these questions that leverages of the success evidenced by previous DBE-led impact studies and initiatives moving towards a whole system programmatic model of district implementation.

The Northern Cape province is dominated by **Afrikaans** (51%), and **Setswana** (34%) in the Foundation Phase as the Home Language and Learning and Teaching. The remaining languages are **English** (11%) and **isiXhosa** (3%). The two First Additional language are English and Afrikaans.

The two-year intervention will roll out high-quality teacher professional development support **across Grades 1 to 3 in all eligible Setswana Home Language non-fee paying monograde and multigrade primary schools of the Frances Baard and John Taolo Gaetsewe districts from January 2024 through to December 2025.** The school and teacher estimates are as follows:

	Monograde	Multigrade
Total number of schools~118	73	45
Total coaching schools = 60	38	22
Estimated maximum learners	40 learners per grade	20 learners per grade
Teachers per school in the Foundation Phase	~4.02	~2

(Learner Educator Ratio= 1:30)		
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The EGRP intervention involves the provision of a structured reading programme as the base programme for all eligible schools. This is further layered with innovative coaching models implemented in 60 priority schools to improve the teaching practice of reading. Ultimately, the improvement of reading outcomes of Foundation Phase learners in both Setswana Home Language and EFAL is anticipated.

[1] Fryer, R. G. (2017), 'The production of human capital in developed countries: Evidence from 196 randomized field experiments', *Handbook of Economic Field Experiments* 2, 95–322.

[2] Popova, A., Evans, D. K., & Arancibia, V. (2016). Inside in-service teacher training: What works and how do we measure it?. *Washington, DC.: Rise Programme*.

1. Intervention overview

The EGRP II intervention involves the provision of a structured learning programme as the base programme for all eligible monograde and multigrade schools, approximately 118 schools. This programme focuses on both Setswana Home Language and English First Additional Language (EFAL). This is further layered with innovative coaching. Ultimately, the improvement of reading outcomes of Foundation Phase learners in both Setswana Home Language and EFAL is the anticipated outcome.

The three main implementation components are.

1.1 Training

All teachers from Grades 1, 2 and 3 across all participating schools will be trained both years at the start of every term. Terms 1 and 3 may include an overnight residential component where each grade is trained for 2 days. Term 2 and 4 will be term training for a single day.

1.2 Materials

All Grades 1, 2 and 3 teachers in participating schools will be provided with the required monograde and multigrade printed Learning and Teaching Support Materials (LTSM) packages for Setswana and EFAL instruction. In addition, they will be provided with tablets containing the lesson plans for monograde and multigrade classes in Setswana HL and EFAL.

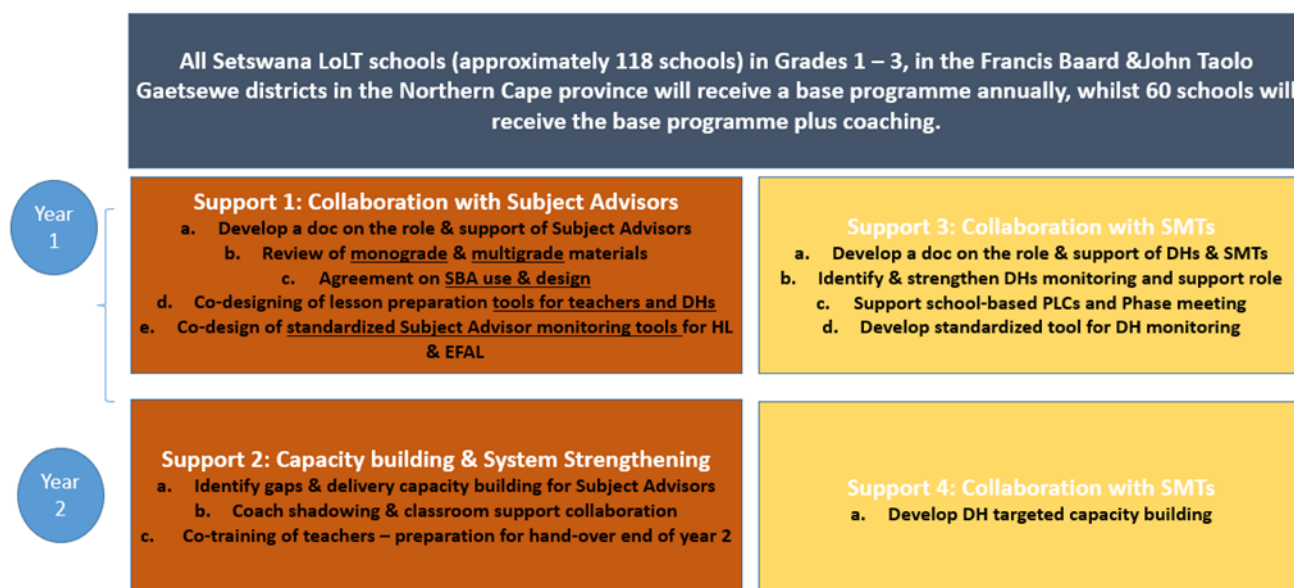
1.3 Coaching

Dedicated Literacy Coaching will be provided by 6 coaches in 60 randomly selected schools for all Grade 1, 2 and 3 teachers in the sample using a blended ICT model. From the 60 randomly selected schools 38 of those schools are monograde and 22 of them are multigrade schools. In year 1 and year 2, each coach will support 10 schools. Based on the current project beneficiary numbers, a single coach would support approximately 3 teachers per school, and roughly 30 teachers overall per term per year.

The remaining group of 58 schools will receive a base programme including LTSM and training for both monograde and multigrade schools and teachers.

1.4 Institutional support

EGRP will explicitly aim to support and capacitate SMTs and Subject Advisors in the province. The range of activities is provided in the figure below.



2. Evaluation Purpose

This evaluation is conducted in support of the Department of Basic Education's (DBE) second Early Grade Reading Programme (EGRP II). The programme is a reading improvement intervention that seeks to support the instruction of Home Language and English First Additional (EFAL) reading outcomes of Foundation Phase classrooms in the Northern Cape province of South Africa. It is jointly funded by the Bill and Melinda Gates Foundation, the United Nations Children's Fund South Africa (UNICEF-SA), Zenex Foundation and the Northern Cape Department of Education (NCDoE) in collaboration with the national DBE.

The two-year intervention will roll out high-quality teacher professional development support across Grades 1 to 3 in all eligible Setswana Home Language instruction non-fee paying primary schools of the Frances Baard and John Taolo Gaetsewe district from January 2024 through to December 2025.

The results of the evaluation will be used by the DBE and the education sector to add to the body of knowledge on the EGRP and will be used for determining the impact of the EGRP for remediation and lessons for scaling in other contexts.

3. Evaluation Objectives

The EGRP Impact Evaluation will cover the criteria of Effectiveness, Sustainability, and Impact. Other elements of the OECD DAC criteria are not a focus as there has been significant evidence generated over the last few years around the EGRP and its related impact evaluations. Through the inception phase, it is expected that the firm will review the previous impact evaluations and studies related to the EGRP to gain a sound understanding of the programme.

The quantitative component of this evaluation that will be used to address the impact criteria will be a Randomized Control Trial design. The intervention has been designed and deployed

randomly across schools in the province. Given that there has been two similar Randomized Control Trials conducted in other provinces, it is a feasible design.

Baseline data collection during the inception phase will aim at reviewing the existing national systems level data to identify gaps/weaknesses to inform lessons that can be used for improving the systems data collection over the evaluation period.

4. Evaluation Scope

The impact evaluation will specifically cover the EGRP II Programme scale up in the Northern Cape Province. The programme will be run from January 2024 – December 2025 and include 118 mono and multigrade schools with approximately 40 students in each monograde classes and 20 students in the multigrade classes.

The main research questions the evaluations will be answering using a mixed method approach are:

Intermediate outcomes and impact

1. What is the overall impact of the coaching interventions on learning outcomes for Setswana and EFAL at the end of the 2 years?
2. What has been the impact of the coaching intervention on learning outcomes for both Setswana HL and EFAL in multigrade and monograde classrooms respectively at the end of 2years of implementation?
3. What are the mechanisms that made the second Early Grade Programme successful?

Fidelity/Effectiveness:

4. How were the core methodologies trained, coached and implemented similarly and differently in monograde and multigrade schools by the implementing service provider?
 - How well is the second Early Grade Reading being implemented?

Sustainability

- How can EGRP II be institutionalised at school, district and provincially?
- How successful was the programme in capacitating Subject Advisors to training and coach? teachers in HL and EFAL?
- How successful and sustainable has the M&E capacity building for Subject Advisors been?
- How well have Professional Learning Communities (PLCs)/School Based Workshops (SBWs) been functioning and why?

A Steering Committee convened by the DBE guides the department's work in this regard, overseeing both implementation and evaluations of these ongoing reading research activities in fulfilment of the EGRS I Improvement plan. An appointed Project Management Team (PMT) oversees the commissioning of service providers and expert researchers to undertake the various components and is made up of representatives from the DBE, UNICEF South Africa, Zenex Foundation and the NCDoe.

The specific quantitative and qualitative elements required for the evaluation are described in the following section:

4.1 Quantitative Data Collection

The main measure of success for the proposed intervention is improved reading outcomes for learners in the Home Language and EFAL in the Foundation Phase. Thus, an experienced data collection survey company with sound experience in Early Grade Reading Assessment (EGRA)-type administration is required to conduct data collection and produce two reports. A baseline in 2023 and at the start of 2024 and an endline at the end of two years of implementation in 2025. The details are below:

- Data Collection in all 118 schools
- Assess 20 learners per grade in both monograde and multigrade schools in two grades
- Learners would be assessed in both Setswana and EFAL.

Specific Undertaking

4.1.1 Learner Test and Questionnaire Development

The appointed Service Provider is required to develop and version learner test instruments in the project's languages using PMT approved EGRA items. The main purpose of the assessments is not to benchmark learners against curriculum requirements, but rather to determine their literacy abilities at the end of milestone years although the assessments will be aligned to the curriculum. Components of the assessment should include an oral assessment to be conducted by a fieldworker with individual learners in a one-on-one setting AND for Grades 2 and 3, a written assessment with a reading comprehension to be completed by learners in a group "exam-type" setting. It is expected that the Service Provider will propose which subtasks or skills will be assessed, for example, whether the test will be assessing the skill of phonemic awareness. To test 20 learners within one school day, it is requested that oral assessment be no longer than 15 minutes and 45 minutes for the written comprehension component.

It is expected that the instruments will be aligned with best practice in early literacy assessment internationally. It is expected that the Home Language test items will be sensitive to the dialect spoken in the respective district so as not to introduce any bias into the results due to contextual differences between learners however the assessments must be based on the standard official languages. It is expected that the assessment caters accordingly for monograde and multigrade learners. A comprehensive yet easy to follow training manual will also be developed and disseminated to Fieldworkers for reference following the training. It will be the Service Provider's responsibility to identify, partner, and pay the use of a translation service provider able to assist with the versioning of the instruments, should these services not exist in-house.

Furthermore, the appointed Service Provider will be responsible for electronically versioning data collection instruments as well as teacher/principal questionnaires, learner home background questionnaires and the like onto the Tangerine ® Application or similar, to enable

remote data collection via Android tablets. Instruments will also include a classroom materials, and reading resources survey.

4.1.2 Pilot and Full Data Collection

The Service Provider will be responsible for conducting the piloting of the instruments during the given timeframe and provide constructive feedback as to how well the questions worked. This will entail versioning test instruments and questionnaires onto the Tangerine ® application or similar prior to pilot data collection. The appointed Service Provider will lead the recruitment, training and supervision of qualified fieldworkers and budget accordingly for all aspects involved therein. This will include but is not limited to, travel and accommodation, training venues, data collection supplies, printing of learner assessments, charts, posters, subsistence fees and so forth. Training will include intensive simulations and an enumerator evaluation to ensure that every individual data collector is able to adhere to the required data collection standards. This should include a simulation visit to schools on a certain day of training. Training will be conducted mostly in English, although the Setswana components of the learner assessment will have to be discussed by people who are proficient in this language. Fieldworkers have to be issued with detailed fieldwork training manuals and wear name tags to identify and associate them with this evaluation.

The Service Provider will be required to produce a clear and binding work schedule that includes a proposed schedule of visits and timeline as approved by the PMT prior to each data collection. The PMT will approve all deliverables including preliminary fieldworker schedule and list of fieldworkers to be used for each round of data collection.

Deliverables

The main deliverable expected is for the Service Provider to furnish the PMT with the final raw data, uncleaned, in either CSV, Excel or Stata format. In addition, a complete report analysing the data with clear interpretation of the findings.

Furthermore, the following deliverables are anticipated:

Baseline/Midline assessment

Services required	Deliverables	Timeline
Inception phase	<ul style="list-style-type: none"> - Establish procedures to ensure that the linking form data is captured accurately and ensure that all the data collected can be linked. - Refined data management plan - Refined quality assurance plan 	Dates to be confirmed with steercom based on finalized contracting dates.
	<ul style="list-style-type: none"> - Grade specific EGRA oral assessments & learner charts 	

Learner Test and Questionnaire Development	<ul style="list-style-type: none"> - Grade 2 or 3 written assessments & learner booklets 	
	<ul style="list-style-type: none"> - Learner Home Background Questionnaires (administered to all parents/ guardians) - Teacher and/or SMT questionnaires - School and Classroom Observation questionnaires - Teacher Language proficiency test - Materials survey: a survey of all the HL and EFAL learner resources 	
Pilot	<ul style="list-style-type: none"> - Fieldworker list - Fieldworker training and manual development - Instrument versioning on Tangerine ® or similar application - Pilot data collection in 5 non-evaluation sample schools 	
Full Data Collection	<ul style="list-style-type: none"> - Fieldworker training and selection - Instrument versioning on Tangerine ® or similar application - Fieldworker schedule and list of Fieldworkers - Full data collection in all schools - Adapted fieldworker manual 	
	Receipt of final raw data, uncleaned, in either CSV, Excel or Stata format.	

4.2 15 – Classroom Observation Study Data Collection

Monitoring and evaluation of this intervention would entail a mixed-method approach to provide micro, meso and macro lessons and insights. The specific sub-components that will be used to measure this will be receipt of lesson plans and LTSM and successful training for all schools. While the measure for coaching will be an analysis of the records of in-classroom observations grounded in the lesson plans and LTSMs consisting of feedback and modelling of core methodologies by the coach. In addition, this data collection should also enhance understanding

and practices of PLC and their functionality. Thus, an experienced evaluation/ data collection survey company is required to:

1. Develop grade specific lesson observation instruments in the languages of the study and curate them specifically for monograde and multigrade classrooms (Grade 1 and 3); multigrade schools have grade 2&3 in the same classroom and the service provider will have to version instruments accordingly for those classrooms.
2. Develop observation instruments for PLCs and needs-based workshops as well as propose additional mechanisms to collect data on practice;
3. Develop appropriate and insightful teacher and SMT structured interview questionnaires; and
4. Pilot, recruit and lead the training of qualified emerging young researchers to collect all components of the 15 Classroom Observation Study in Year 2.

Specific Undertaking

4.2.1 Instrument development

The Service Provider will have the requisite observational research experience and expertise in Foundation Phase curriculum development and language instruction in order to develop rigorous and in-depth lesson observation instruments. Monograde tools already exist and will have to be adapted for multigrade classrooms. The details on the instruments are provided below.

4.2.2 Pilot and Full Data Collection

The Service Provider will be responsible for conducting the piloting of the instruments during the given timeframe and provide constructive feedback as to how well the instruments worked. This will entail versioning instruments and questionnaires onto the Tangerine ® application or similar prior to pilot data collection and full data collection. The appointed Service Provider will lead the recruitment, training and supervision of qualified fieldworkers and budget accordingly for all aspects involved therein. This will include but is not limited to; travel and accommodation, training venues, data collection supplies, printing of instruments (if applicable), stationery and so forth.

Description of the quantitative data collection phase

The main deliverable expected is for the Service Provider to furnish the PMT with the final raw data, uncleaned, in either CSV, Excel or Stata format.

The following deliverables are anticipated:

Services required	Outputs	Tentative Timeline (To be adjusted with the steercom based on final

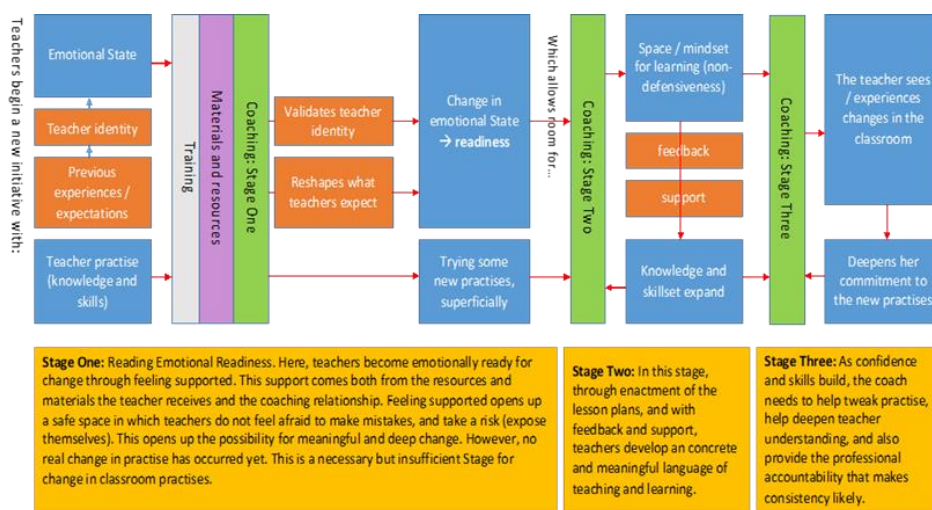
		contracting dates)
Instrument development by expert curriculum/linguistic researcher.	<ul style="list-style-type: none"> - 1x EFAL lesson observation instrument for Grades 1 and 3 for both monograde and multigrade classrooms; - 1x Home Language lesson observation instrument for Grades 1 and 3 for both monograde and multigrade classrooms; - Structured teacher interview questionnaires for Grades 1 and 3 teachers; - A coach shadowing tool; - A PLC observation instrument to be used with teachers; - Structured document review questionnaire (to be completed independently by enumerators); - All required protocols and training manuals for enumerators 	
Service provider to version instruments and questionnaires onto suitable software.	Completed instrument links for review by PMT	
Service provider to recruit, train and manage oversight of fieldworkers for PILOT at schools.	<ul style="list-style-type: none"> - FW recruitment plans - Completed fieldworker training and Pilot fieldwork schedules, 	
Service provider to recruit, train and manage oversight of fieldworkers for full 15 school data collection at schools.	<ul style="list-style-type: none"> - Final fieldworker schedules and list of fieldworkers - Final raw and cleaned data to PMT for pilot and full data collection 	

4.3 Qualitative Case Studies

In addition to learner assessment, measures of success for coaching will be a substantial number of teachers implementing the curriculum well with sustained changes in their practice. Using a theory of change on coaching developed from EGRS II as in the diagram below. The study will aim to increase the number of teachers that are confident and effective.

In addition, case studies should enhance the understanding of the practices and mechanisms for successful multigrade training, coaching in multigrade classrooms. Data gathered should include identifying enabling conditions for PLCs, the main and the documenting of successful and unsuccessful PLCs as well as why this happens.

Figure 2: Stages of teacher response to coaching



Taken from K Alsofrom 2018 EGRS II Qualitative Case Study

Specific Undertaking

- The development of data collection materials and instruments that are based on international best practice, but adapted for the local context;
- The instruments need to ensure that the capturing of information allows for a nuanced understanding of what changes in behaviour and practice have led to improved learner outcomes, and the extent these changes could impact HL and EFAL learner outcomes in the Foundation Phase at a larger scale.
- On-site observations of six HL and EFAL lessons of monograde and multigrade learners and teachers across the EGRP II schools in Year 1 and 2 (1x case per school);
- On-site observation and interviews with Teachers and coaches establishing PLCs ;and
- A final narrative case study report to be shared alongside other EGRP II findings to stakeholders and the public at large in Year 1 and 2. The reports should include a review of relevant literature and programme documents to substantiate and interpret the findings.

Research questions to guide the inquiry will be co-created with the PMT researchers, often investigating specific themes or emerging questions emanating from the larger quantitative impact evaluation. It is expected that the Service Provider will have the requisite research capacity with a proven track record of undertaking qualitative research. Should the Service Provider not have such capacity internally, proof of subcontracted consultants or academic researchers must be listed with the working relationship described in full. CVs of all intended researchers must be outlined in the proposal. All aspects relating to the case studies will be led and overseen by the Service Provider, this includes but is not limited to: travel and

accommodation, researcher/ consultant data collection and report development time, school arrangements (with support from DBE) and so forth. Proposals will need to budget for all aspects of this.

Description of the qualitative data collection phase

Services required	Outputs	Timeline
6 Case Studies in year 1 in pre-selected schools across the EGRP II sample	<ul style="list-style-type: none"> - Inception/ planning meeting w/ PMT - Questions, methodology and approved fieldwork plan - In school data collection - Preliminary case study report for PMT review - Final case study report 	To be confirmed with steercom based on finalized contracting dates.
6 Case Studies in Year 2 in pre-selected schools across the EGRP sample	<ul style="list-style-type: none"> - Inception/ planning meeting w/ PMT - Questions, methodology and approved fieldwork plan - In school data collection - Preliminary case study report for PMT review - Final case study report 	

5. Evaluation Criteria and Questions

The following evaluation criteria and tentative list of questions will be covered. Upon starting the evaluation, the evaluation firm will have introductory meetings with the key programme stakeholders (i.e., Project Management Team / Steering Committee) to refine and flesh out the specific evaluation questions. The final list of detailed and refined evaluation questions will be included by the firm in the inception report categorizing them against the different OECD DAC criteria after refinements and consultations with programme stakeholders have taken place.

Criteria	Guidance to prepare questions
EFFECTIVENESS: <i>Is the intervention achieving its objectives?</i>	<ul style="list-style-type: none"> How were the core methodologies trained, coached and implemented similarly and differently in monograde and multigrade schools by the implementing service provider? How well is the second Early Grade Reading being implemented?
SUSTAINABILITY: <i>Will the benefits last?</i>	<ul style="list-style-type: none"> How can EGRP II be institutionalised at school, district and provincially? How successful was the programme in capacitating Subject Advisors to training and coach? teachers in HL and EFAL? How successful and sustainable has the M&E capacity building for Subject Advisors been? How well have Professional Learning Communities (PLCs)/School Based Workshops (SBWs) been functioning and why?
IMPACT: <i>What difference does the intervention make?</i>	<ul style="list-style-type: none"> What is the overall impact of the coaching interventions on learning outcomes for Setswana and EFAL at the end of the 2 years? What has been the impact of the coaching intervention on learning outcomes for both Setswana HL and EFAL in multigrade and monograde classrooms respectively at the end of 2years of implementation? What are the mechanisms that made the second Early Grade Programme successful?

6. Evaluation Approach

The evaluation will be conducted in accordance with United Nations Evaluation Group (UNEG) Norms and Standards for evaluations. The envisioned methodology would include a mixed-methods approach with the quantitative element comprising of a randomized control trial. The evaluation approach should be human rights based, including child rights and consider equity including that of being gender sensitive. A mixture of qualitative and quantitative methods should be employed to answer the evaluation and the evaluation firm will be expected to develop a detailed methodology demonstrating data types and sources as part of the initial inception report.

a) Evaluability assessment

The evaluation team will be expected as part of the inception phase, to conduct a brief evaluability assessment with key programme stakeholders. The evaluability assessment will determine the following as part of the inception report.

- Does the programme have a clear theory of change/logic model? Does it address the problems identified?
- Is the results framework of the programme coherently articulated and aligned to country context and national priorities?
- Do the outputs, outcomes and overall goal follow the result chain logic?
- Is the results chain coherent, logical, with clearly articulated?
- Are the results clear and realistic? Are they measurable (quantitatively or qualitatively)?
- Does the sector programme have a monitoring system to gather and systematize the information with defined responsibilities, sources and periodicity?
- Are baselines in place for the indicators part of the results framework?

As part of this assessment, the evaluators will be expected to conduct a thorough review and analysis of the wide array of secondary data available to identify information gaps and other evaluability challenges and discuss solutions to address them with the evaluation steering committee/key stakeholders of the evaluation. This assessment should also highlight evaluation questions that cannot be evaluated at this time due to data/information gaps or implementation challenges which will allow for the refinement of the preliminary evaluation questions for each sub-programme based on the results of the assessment.

b) Data collection

Qualitative and quantitative methods will be used. The data collection will be as participatory as possible, engaging a broad range of stakeholders, beneficiaries and data sources. It is envisioned that data collection and analysis methods are to be human rights based, including being child rights based and gender sensitive, and for the evaluation data to be disaggregated as far as possible by gender, ethnicity, age, disability and so forth as relevant for answering the evaluation questions adequately. Preliminary reliability of disaggregated data should be conducted within the evaluability assessment phase which will inform the data collection and analysis methods. Key sources of information could potentially include:

- Document review during inception stage to frame the evaluation and during data collection.
- Analysis of program primary monitoring data i.e., implementing partner progress reports
- Analysis of secondary data including program data, data from other global reports and sources and the department of health monitoring systems
- Key informant interviews with Government staff at central level as well as at provincial, district and facility level
- Surveys/assessments that the evaluation team considers appropriate for answering the key questions.

For the EGRP Evaluation, there will be an assessment during the inception phase of the existing systems level data collected by the government to understand how and to what extent such data could be used as a baseline for monitoring results of the EGRP programme. Some lessons learned and recommendations should come out of this assessment to allow for improving the systems data collection over the duration of the programme.

For the impact evaluation component, the firm is to develop and administer mid-line and end-line surveys to all schools as described in section 4 (evaluation scope).

c) Limitations

Some potential limitations could be the availability of key stakeholders for consultation/interviews which could cause some delays and responses from schools when data collection needs to be scheduled/conducted. Given that the contract will run over the programme duration these should be proactively managed by the evaluation firm in consultation with the evaluation steering committee to which the firm reports to. This should be planned for by the firm in terms of leaving additional time for obtaining documents/files from key stakeholders and scheduling of meetings/interviews when participants are not available.

d) Process for verifying findings

The evaluation is aimed at being as participatory as possible and during each key stage stakeholders will be convened for either physical or digital meetings to validate draft findings. Once a draft product has been submitted and all comments and feedback has been incorporated by both UNICEF and key stakeholders then the evaluation will proceed onto the subsequent stages and payment made. This ensures a common ownership of the evaluation findings by all stakeholders throughout the process.

7. Workplan, Deliverables, Schedule and Budget

The evaluation is envisioned to run tentatively over a period of 20 months, from May 2024 to December 2025, and broadly required a level of effort of the team/firm of 70 working days.

It is not expected for the firm to work throughout the 20-month evaluation period, but only in periods where data comes available/or analysis required, inception phase, data collection and report writing. A solid project management focal point is required to ensure that the evaluation firm sticks to the time allotted from the firm to undertake the assignment.

Each bidder will make a proposal based on best effort using the information in the ToR to undertake the evaluation and number of working days and timeline can be adjusted within reason as long as the overall cost is reasonable to produce a high-quality evaluation.

Payments will be made according to the following proportions of the work plan. Payments are made on approved deliverables, which means that once a draft product is submitted it will be reviewed by the evaluation steering committee and other key stakeholders for comments which have to be incorporated into the final product before the firm can move onto the next phase.

Deliverables included under the specific evaluation service components will inform the nature and timing of reports and other required data/information. Exact dates will be negotiated as part of the contracting process. Budget schedules will also be negotiated before signing the contract. The contract will be

subject to performance reviews by the EGRP II PMT and, who may discontinue the contract at any time based on substandard performance or non-delivery.

Workplan	Deliverables	Timeline for delivery	Estimated effort of firm in working days	Payment percentage
<u>Preparatory Phase</u>				
a) Secondary data collection and desk review/analysis – review of the existing systems level data that is periodically collected by government/education department. b) Preliminary stakeholder analysis c) Preparation for the inception phase d) Evaluability assessment to inform draft evaluation questions and overall evaluation/inception report	a) Brief report/analysis of outcome results of studies using the existing systems level data and usability for a baseline and continued monitoring of EGRP outcomes including findings of gaps/areas of improvement for the data. b) Succinct evaluability assessment presentation/discussion on findings to Project management team/Steering Committee	2-4 weeks after signing contract	10 team working days	10%
<u>Inception phase</u>				
e) Draft inception report (including evaluability assessment, Theory of change review, refinement of key evaluation questions) f) Presentation of the draft inception report – in person or via video link – to the Evaluation Reference Group;	c)Draft inception report; d)Presentation of the draft inception report – in person or via video link – to the Evaluation Reference Group; e)Final inception report (plus completed audit trail addressing all comments) f) Approved field work instruments and ethical	1.5-2 Months after signature of contract	15 team working days	25%

<p>g) Final inception report (plus completed audit trail addressing all comments)</p> <p>h) Development of field work instruments, consultation with programme teams on the data collection instruments</p>	approval from local ethical review board			
<p><u>Data collection phase</u></p> <p>i) Specifics of the quantitative and qualitative data collection is detailed in section 4. Of the ToR, the firm is present the key data collection tools to the PMT to ensure approval. These could include: Protocols, Data management plan, quality assurance plan, questionnaire development, fieldworker list and field data collection plan.</p> <p>j) Presentation of preliminary findings at a workshop with key evaluation stakeholders, including the Evaluation Reference Group</p>	<p>g) Field work data collection plan, tools and protocols for the pilot and actual data collection phases.</p> <p>h) Data collection and field work report and presentation of preliminary findings to steering committee/reference group (both for the quantitative aspect and qualitative case studies - 6 case studies for year 1 and 6 case studies for year 2)</p>	<p>Baseline/ Midline data collection schedule d tentatively for 2024 and End-line for latter half of 2025.</p> <p>Case study timeline to be discussed and agreed with project management team. Dates are confirmed in consultation with the PMT.</p>	25 team working days	40%
<p><u>Drafting, validation and completion phase</u></p>	<p>i) PowerPoint presentation – in person or via video link – on emerging findings,</p>	20 months after	15 team working days	20%

k) PowerPoint presentation – in person or via video link – on emerging findings, conclusions and recommendations l) A complete first draft evaluation report; m) Presentation of the draft evaluation report – in person or via video link – to the Evaluation Reference Group; n) A final evaluation report (plus completed audit trail addressing all comments)	conclusions and recommendations j) A complete first draft evaluation report; k) Presentation of the draft evaluation report – in person or via video link – to the Evaluation Reference Group; l) A final evaluation report (plus completed audit trail addressing all comments)	signature of contract		
<u>Dissemination and Advocacy</u> o) Evaluation brief/ Policy brief/Poster/Infogram presentation that summarizes the evaluation findings p) Possible presentation of the findings, conclusions and recommendations at a government or stakeholder workshop/forum with key evaluation stakeholders	m) Refinements of powerpoints and shorter executive summary/2-5 pager summary of the evaluation /or presentations at one or more stakeholder meetings decided by the evaluation steering committee	20 months after signature of contract	5 team working days	5%
<u>Total amount</u>		20 months	70	100%

Dissemination and Advocacy Plan

A key component of evaluation influence is the effective communication and dissemination of evaluation results and syntheses. As a base the evaluation report will be made public on the external website. A shorter executive summary and related result PowerPoints are included in the expected deliverables. Based on engagement with key stakeholders there may be a requirement for presentation of the draft results at stakeholder meetings which a subset of the team/evaluation lead may undertake.

For this purpose, the following guidelines¹ need to be followed:

- [UNICEF Style Guideline](#)
- [UNICEF Brand book](#)
- [UNICEF Infogram Guidelines](#)
- [ESARO Guidance Note on Dissemination and Advocacy Plans](#)

8. Management and Quality Assurance Arrangements

UNICEF applies the Global Evaluation Reports Oversight System (GEROS) to support and strengthen the evaluation function. GEROS was informed by the United Nations Evaluation Group (UNEG) Norms and Standards for Evaluation 2016 and the UNICEF-adapted UNEG standards are the basis for quality assessment of final evaluation reports.

At each phase of the evaluation, major draft deliverables submitted by the firm will be reviewed by relevant stakeholders including that of the evaluation reference group and UNICEF regional office. Deliverables will need to be rated at least satisfactory according to the regional office's review based on the GEROS standards before the deliverable can be finalized and the firm can proceed to the next phase of the evaluation. Feedback and comments will be provided to the firm for incorporation into the finalization of the draft deliverables.

- The Evaluation Manager and/or on behalf of the Steering Committee will act as the primary liaison with the Evaluation team and facilitate the data collection and evaluation process at the country level. According to UNICEF 2018 Revised Evaluation Policy, management arrangements for each evaluation should ensure independence and impartiality. Therefore, the Evaluation Manager should not be part of the team that designs and/or manages the implementation of the assessed policy, plan or programme. The designated evaluation manager supervises the selection of the evaluation team, manages the consultants and has the authority to hold them to a high standard of performance. The evaluation manager is ultimately responsible for the quality of the evaluation.
- Key stakeholders, including excluded groups and, as appropriate, children and young people, should be engaged at relevant points, starting with the design phase. The involvement of children and young people should follow appropriate ethical guidelines and requires approval in accordance with [UNICEF procedures](#).
- Evaluation Reference Group (ERG) should comprise key stakeholders, including Government counterparts; several UNICEF senior CO and (if required) ESARO staff members; select development, civil society and private sector partners. The ERG has an advisory capacity whose primary role is to facilitate access to information/informants and review evaluation deliverables (terms of reference, inception report, draft evaluation report) and to provide comments.

¹ Links only accessible for UNICEF Staff, please request it to the UNICEF Evaluation Manager.

- The role of ERG, Evaluation RO Section during review of evaluation products (Inception Reports, Evaluation Reports, Communication Documents). Describing the process for obtaining and incorporating evaluation comments.
- The evaluation consulting firm should provide updates on the progress of the evaluation. Inception report and draft final report will be subject to a satisfactory rating by the regional office, using quality assurance checklists, before payment can be made.
- Relevant documents: ESARO Quality Assurance Guidelines; ESARO Note on ERG (Links only accessible for UNICEF Staff).

A Steering Committee convened by the DBE guides the EGRP work in this regard, overseeing both implementation and evaluations of these ongoing reading research activities in fulfilment of the EGRS I Improvement plan. An appointed Project Management Team (PMT) oversees the commissioning of service providers and expert researchers to undertake the various components and is made up of representatives from the DBE, UNICEF South Africa, Zenex Foundation and the NCDoe. UNICEF South Africa will be the contractual body for this evaluation service provider and also forms part of the PMT. This advisory body will advise on all key aspects of the evaluation activities.

Intellectual property: the appointed service provider will assign to DBE/UNICEF its copyrights to all data, instruments, documents, and reports emanating out of this study.

Permission may be sought by the service provider to use any data from the research. Such permission will not be unreasonably withheld provided the data will make a positive contribution to the sector and all reports and presentations emanating from such, will acknowledge the Foundation's role.

The results of the findings will be shared with the broader sector and other participating stakeholders such as schools, other funding agencies, and key identified role players in education including the Department of Education.

9. Guiding Principles and Ethical Considerations

The evaluation consulting or firm should adhere to the following UN and UNICEF norms and standards and is expected to clearly identify any potential ethical issues and approaches, as well as the processes for ethical review and oversight of the evaluation process in their proposal. Copies of all these documents will be provided upon request and can also be access on: <http://www.unevaluation.org/>

- United Nations Evaluation Group (UNEG) Standards for Evaluation in the UN System,
- United Nations Evaluation Group (UNEG) Norms for Evaluation in the UN System, (including impartiality, independence, quality, transparency, consultative process.
- Ethical Guidelines for UN Evaluations and the UNICEF procedure for ethical standards in research, evaluation, data collection and analysis will guide the overall process.
- UNICEF adapted evaluation report standards and GEROS
- The evaluation should incorporate the human rights-based and gender perspective and be based on results-based management principles and logical framework analysis.

The Evaluation team is required to clearly identify any potential ethical issues and approaches, as well as the processes for ethical review and oversight of the evaluation process in their proposal. Owing to the envisaged participation of human subjects in the evaluation, the evaluation team is encouraged to seek ethical review board approval preferably from a recognized IRB. For the evaluation, it is expected that with interviewing young people and those who are socioeconomically disadvantaged, that the firm will be required to obtain ethical clearance from a recognized IRB in South Africa, such as through a University or government authority.

List of reference documents²:

- [United Nations Evaluation Group \(UNEG\) Norms and Standards for Evaluation in the UN System](#)
- [UNEG Ethical Guidelines for Evaluations](#)
- [UNICEF procedure for ethical standards in research, evaluation, data collection and analysis](#)
- [UNICEF-Adapted UNEG Evaluation Reports Standards](#)
- [GEROS Quality Assessment System](#)
- [UNICEF guidance on external academic publishing](#)

Below additional links only accessible for UNICEF Staff, please share once a consultancy firm has been chosen.

- [UNICEF Style Guideline](#)
- [UNICEF Brand book](#)
- [Universalia Checklist for Inception Report](#)

10. Qualification Requirements

Institutions with strong background in conducting impact evaluations of development programmes and interventions, especially in the context of the education thematic area, are encouraged to submit a proposal. The assessment team should be gender balanced, culturally diverse and composed of a team leader and additional team members, both national and international.

Specific requirements include:

1. Expertise in conducting similar or related evaluations/assessments, including proven track record of assessments of similar large multisectoral and multi-stakeholder efforts supported by UN or UNICEF;
2. The team should have at least one member who is a methodological expert/specialist on randomized control trials; the team leader should have at least a master's or PhD degree and at least 5 years' of relevant technical evaluation experience.
3. Knowledge of the education sector and related programming would be a benefit;
4. A work record in South Africa is beneficial;
5. Excellent command of English, with a proven ability to prepare high-quality reports.
6. Strong quantitative and qualitative analytical skills;
7. A team lead who has held a lead role in assessments of similar scope/complexity;
8. Competent evaluation specialists, gender and development specialists, researchers, and data specialists;
9. Demonstration of capacity to carry out the assessment and complete deliverables under time requirements and interfacing with a broad group of stakeholders;
10. The firm must submit samples of similar evaluations they have conducted.

² All these documents should be shared by the Evaluation Manager with the consulting team.

11. Team should be proactive and have good project management and stakeholder engagement skills to ensure regular meetings are held and timelines are met

Significant advantages

- ❖ Record of top-ranked evaluation reports by GEROS.

11. Requirements for Technical and Financial Proposals (For Institutional Contracts)

This evaluation can be awarded to a firm or institution working under the coordination of a team leader. Proposals will be evaluated based on a combination of technical and financial considerations including the need to meet the mandatory criteria. The technical quality of the proposals will account for 70 per cent of the final score; financial proposals will account for 30 per cent.

Please note: Interested applicants and those who have submitted/working on proposals will be invited for a session (date TBC) during which the project team will present the programme evaluation and clarify any points. To be invited to the session, applicants will need to make the request to the procurement team so that your details are on file.

A panel will review the technical proposals first; only proposals that meet the mandatory criteria and receive a minimum of 50 points during the technical evaluation will be considered further. Proposals that pass the technical stage will then receive a financial score and the two scores will be added together.

Content of the technical proposal

- A. Table of contents
- B. Presentation of the bidding institution or institutions if a consortium, including:
- C. Short narrative description of the bidding institution's experience and capacity in the following areas:
- D. List of similar/relevant past and on-going assignments carried out by the proposer in the past 7 years.
- E. List of full reports (preferably with links to full reports) as examples of relevant past and on-going assignments of the proposer (at least 3), on which the proposed key personnel directly and actively contributed or authored.
- F. Proposed methodology.
- G. Work plan.
- H. Evaluation team.

Content of the financial proposal (Note: submitted separately to the technical proposal)

Costs will be formulated in US dollars/South African Rand and will exclude taxes – VAT, if included is to be specifically indicated separately. It will include the following elements as a minimum requirement:

- A. Overall price proposal – submitted separately.

B. Budget by phase, by activity, and by cost category as per UNICEF procurement procedures, the budget for this evaluation assignment is not disclosed. All Travels, costs for accommodation, meals and incidentals shall be included into the fixed price proposal if necessary and should not country norms.

Assessment of Proposals Process and Methods

Interested and qualified evaluation firms are requested to submit one technical proposal and one financial proposal within the indicated deadline. After the opening, each proposal will be assessed first on its technical merits and subsequently on its price.

All bidders' proposals will be reviewed by the evaluation panel. The proposal with the best overall value, composed of technical merit and price, will be recommended for approval. The overall weighting between technical and financial evaluation will be as follows: The technical component will account for 70 per cent of the total points allocated and the financial component will account for 30 per cent of the total points allocated. The assessed technical score must be equal to or exceed 50 of the total 70 points allocated to the technical evaluation in order to be considered technically compliant and for consideration in the financial evaluation.

The financial proposal should include all eligible costs (fees, international and field travel expenses, etc.) of the evaluation team. The evaluation partner is also expected to work independently and regular overhead costs relating to office space and equipment should be included in the financial proposal. The arrangement of necessary human resources including research assistants, enumerators and data entry personnel must be well defined and costed in the proposal.

Below is allocation of points to both the technical and financial evaluation.

ITEM	TECHNICAL EVALUATION CRITERIA	MAX OBTAINABLE POINTS
1	Overall quality of the technical proposal <i>Demonstrated understanding of the assignment by the proposer and the responsiveness of the proposal submitted to the TOR.</i>	10
2	Company experience <i>Range and depth of organizational experience in the provision of the services mentioned in the TOR such as large-scale national data collection for education sector or related work and in the conduct of impact evaluations, samples, and references of previous work.</i> 1.1. <i>Provided 3 recent reference letters and details of the fieldwork undertaken for each of them.</i> 1.2. <i>Specific experience in the primary-school sector and especially in assessing school-going learners aged 7 – 10 will be preferred.</i>	15

	<i>Specific experience in collecting data using electronic devices/ online data collection tools</i>	
3	Proposed Methodology and Approach <i>Quality and appropriateness of the overall approach and methodology proposed to design and undertake the evaluation per the evaluation criteria and key evaluation questions, including detailed work plan in line with the TOR.</i> 1.3. demonstrating understanding of the project and plans to successfully complete the project within the prescribed timeframe.	20
4	Quality of the proposed team and capacity: 1.4 List of team members, admin team and contractors/experts to be used in specific activities. This includes CVs of the team leader and researchers/evaluators; 1.5 Specific impact evaluation/RCT methodology expert/specialist is desirable 1.6 Headcount, names, qualifications, and language proficiency of fieldworkers/ researchers (in all required languages) included in bid with indication of availability to work on the project. If a full list of fieldworkers by name is not yet available, include a list of fieldwork supervisors as well as a strategy for recruiting.	25
TOTAL TECHNICAL SCORE		70
* A minimum technical score of 50/70 is required.		
TOTAL FINANCIAL SCORE		30
SUMMARY OF TECHNICAL & FINANCIAL SCORE		100