

DATA COLLECTION PROCUREMENT

An Investigation into Building a Resilient Skills Ecosystem: Defining a Forward Path of Education & Training in Light of the Pandemic and 4IR/5IR Shifts in the ETD Sector.

A multi-stakeholder investigation approach

SPECIFICATION

BID DESCRIPTION: Survey on the impact of COVID-19 in education and training sector

ANNEXURE A:

The Human Sciences Research Council (HSRC) of South Africa is Africa's largest dedicated social science and humanities research agency. It primarily conducts large-scale, policy-relevant, social-scientific projects for public-sector users, for non-governmental organisations and international development agencies in support of development nationally, in the Southern Africa region, and in Africa.

The HSRC's origins date back to 1929. Its current legal status and mandate derives from the HSRC Act, Act 17 of 2008, which establishes the HSRC as a statutory science council accountable to the Minister responsible for science, technology, and innovation. The HSRC's mandate is to inform the effective formulation and monitoring of government policy; to evaluate policy implementation; to stimulate public debate through the effective dissemination of research-based data and fact-based research results; to foster research collaboration; and to help build research capacity and infrastructure for the human sciences. Research activities and structures are closely aligned with South Africa's national development priorities.

See more at: <http://www.hsrc.ac.za>

1. INTRODUCTION

The HSRC wishes to appoint a Fieldwork Organisation to conduct data collection in the form of a survey of stakeholders in the fourteen subsectors within the ***Education, Training and Development Practices Sector Education and Training Authority (ETDP SETA)***.

2. BACKGROUND

The Coronavirus (COVID-19) pandemic has had an unprecedented impact on the national economy, creating uncertainties regarding the scope and nature of implications for various sectors. The education and training sector is no exception, with students, employers, and employees all being affected.

The ETDP SETA, mandated with promoting and facilitating skills development with the aim of improving the skills profile of the workforce in the education, training, and development sector, now faces the arduous task of planning for and implementing policy that will position the sector well to respond to the implications of COVID-19 and 4IR.

The context of the study is crucial. COVID-19 and 4IR have and are resulting in many responses, adjustments, and changes to the core systems of the education, training, and development sectors, which have affected learners, employees, employers, and the SETA.

However, planning, policymaking, and implementation requires a clear assessment of the disruption arising from COVID-19 and 4IR on its constituencies or sub-sectors and how they have attempted to recover and reconstruct their roles and responsibilities with respect to skills development for the sector.

Obtaining robust intelligence on the state of skills supply, demand, and shortages within the sector is at the heart of this endeavour. Additionally, reflecting on the emerging skills and related challenges is necessary to inform planning and implementation of appropriate interventions, as well as general funding decisions and allocation of resources from the SETA to support its various sub-sectors.

The pandemic and 4IR have caused widespread disruption in traditional educational systems and training programmes, leading to an urgent need for educators, learners, and policymakers to adapt quickly to rapidly changing circumstances.

The HSRC now seeks to conduct a survey with the diverse set of sector stakeholders to develop a comprehensive understanding of the multi-faceted and complex dynamics and challenges arising from these disruptions on the ETD sectors. The research aims to inform strategies, policies, and practices that will ensure the resilience and relevancy of education and training in the evolving global landscape.

This study seeks to use a survey to explore stakeholder perceptions and understandings of the disruptions that have affected the sector and to identify innovations and strategies adopted or could be adopted to build and strengthen a resilient skills ecosystem which will define a forward path for education & training considering the pandemic and 4IR/5IR shifts in the ETD sector.

3. SCOPE OF THE WORK

The approved service provider is expected to collect data through interviews and targeted focus groups with stakeholders from across the 14 ETD Sub-Sectors in South Africa on the following broad aspects:

- a) **To assess the status of skills development in ETD sectors in relation to the challenges posed by the COVID-19 pandemic and 4IR.**
- b) **To identify the measures and strategies that organisations in ETD sub-sectors have implemented for post-COVID-19 recovery and for 4IR transitions and for long-term resilience.**
- c) **To explore the emerging trends concerning staff numbers, new work methodologies, curricular reforms, and shifts in skills and training practices in response disruptions.**
- d) **To estimate the financial repercussions of COVID-19 and 4IR on the ETD sector and understand its long-term financial implications.**
- e) **To determine the strategies and approaches ETD subsectors are adopting to ensure they uphold and fulfil their mandates and define a pathway forward.**

3.1. Sampling Framework for the Study

The quantitative dimension of the study will ensure a stratified representative sample across the varied sub-sectors in the ETD sector. This set of data collection will involve:

- collecting through a survey (CATI) with electronic data capturing.
- Data collection will include face-to-face (in person data collection and telephonic surveys
- A limited number of focus groups with designated stakeholders will be required.

Table 1: Quantitative component target groups and sampling targets

<i>Sub-Sector</i>	<i>Approximate Population</i>	<i>Targeted Sample of Institutions/Employees</i>	<i>Total Sample Size of Stakeholders to be surveyed</i>	<i>Type of Data collection Approach</i>
ECD centres	42400	500 - 50 per province (stratified by urban, rural and by types of ECD centres) - 50 x National	500	60% face to face interviews 40% telephonic
Provincial Departments of Education (Public Schooling)	9	9 depts x 6 persons (specific directorates to be identified by HSRC)	54	50% in person interviews 50% telephonic interviews
Independent Schools	2084	30 per province (urban, rural)	270	50% Face to face interviews

Sub-Sector	Approximate Population	Targeted Sample of Institutions/Employees	Total Sample Size of Stakeholders to be surveyed	Type of Data collection Approach
Public TVET Colleges	50	50 TVETS (provincial) (2 campuses per institution)	100	50% telephonic 50% face to face interviews
Public HEIs	26	26 HEIs (4 people specific directorates to be identified by HSRC)	100	50% telephonic 100% Telephonic Interviews
Registered and pro. registered private FET Colleges and HEIs.	451	150 (Stratified by province, urban and rural – equi-proportionally)	150	50% face to face interviews 50% telephonic interviews
Adult and Community Learning Centres	20062	150 (Provincial) (Urban and rural)	150	In person interviews
NGOs in Education,	1000	110 (10 per province and 20 national)	110	
Research and Policy Development Institutions	52	52 (2 persons per institution)	104	
Libraries and Archival Services (10 per province)	11300	100 (10 per province and 10 national services)	100	
Registered Trade Unions	204	100 (10 per province and 15 national)	105	
Registered Political Parties	1489	110 (10 per province and 20 national)	110	
Department of Basic Education	1	12 directorates	12	
Statutory Bodies (SETAs, Pro-Bodies and QA Bodies in ETD)	28	28	28	
School Governing Bodies as employers (linked to public schools) (stratified) (9 per provinces)	834	280 (30 per province) plus 9 provincial SGB Association and 1 National SGB Association	280	

Sub-Sector	Approximate Population	Targeted Sample of Institutions/Employees	Total Sample Size of Stakeholders to be surveyed	Type of Data collection Approach
Other Education Services (100)	1141	10 per province 10 x National	100	
Sector and Thematic focus groups (8-10 person per group)		20	200	
Total			2463	
We will apply stratified purposive sampling.				
# Focus Group (face to face 50% and virtual 50%)				
# Data collection as in person interviews and telephonically administered interviews.				

A minimum of sample size of 40% response will be expected. Data collection methods may differ based on the group (as quoted by the bidder and agreed between the successful bidder and the HSRC), e.g. telephonic survey, face-to-face interview and focus group sessions. The aim of the sampling is to guarantee the representativeness of key stakeholders (e.g., by using stratification and relevant sampling criteria such as sector, institution/organisation, gender, race, etc.). The stratification will be guided by the HSRC.

3.3 Time frame

The successful service provider is expected to complete the quantitative data collection in no more than 10 weeks from the date that both parties have signed the Service Level Agreement.

The data-collection process will be divided into three broad phases as outlined in the table below.

Phase	Activities	Time period / complete by
Phase 1	1.1. Inception Phase 1.2.	Based on Purchase Order issued (mid-January 2024)
Phase 2	1.3. Training and Instrument uploading 1.4. Internal testing of instrument 1.5. Pilot conducted. 1.6. Refinements to instrument and fieldwork protocol	3 rd week January 2024

Phase 3	1.7. Main data collection fieldwork 3.1. Weekly reporting	4 th week Jan to end Feb 2024
Phase 4	3.2. Raw data set 3.3. Data cleaning 3.4. Transcripts of Focus group discussions 3.5. Excel data set of results 3.6. Fieldwork Report	8 March 2024

The HSRC team will provide consistent feedback to the successful bidder throughout the course of the data collection process.

3.4 Activities to be covered in the field by the successful bidder

The service provider is responsible for the following:

- i. Participate in inception process including meetings (online)
- ii. Submission of inception report with final workplan with activities and deliverables
- iii. Development of a sample database and proposed sample distribution plan for review and approval by the HSRC
- iv. to HSRC of finalised instrument electronically and in word
- v. Return of completed Ethics forms and data (raw data and cleaned data sets in excel, STATA, Atlas ti bundles and focus group transcripts) to the HSRC in Pretoria.
- vi. Providing the HSRC with the names and contact details of all the data collectors, fieldwork organisers and fieldwork supervisors to be used in the survey, including indications of their experience with fieldwork, language proficiency, and formal qualifications.
- vii. Identify and secure contact details for stakeholders to be interviewed, drawing on the database provided.
- viii. Participation in national training workshop (3-4 days) for data collection facilitated by HSRC, but venue and travel logistics etc., to be organised by service provider.
- ix. Pilot testing of instruments and fieldwork protocol
- x. Provision of final planned fieldwork schedule (data-collection visits in writing to the HSRC before fieldwork commences.
- xi. Provision of weekly progress reports on fieldwork including challenges experience
- xii. Strict adherence to the rigours and ethics of social survey research (as committed to in the HSRC Research Ethics Clearance Certificate).
- xiii. Proper supervision and monitoring of the work of fieldworkers throughout the survey by means of the regular and sufficient presence and guidance of experienced fieldwork supervisors.
- xiv. All logistics, travel, accommodation and subsistence arrangements are on the cost of the service provider.
- xv. A quality Fieldwork Report to be submitted to the HSRC

3.5 Specific related requirements

- i. The service provider is willing to cooperate fully with the HSRC in all aspects of the survey design and implementation.
- ii. The service provider provides the HSRC with sufficient, correct, and updated information on fieldwork schedules to enable the HSRC to plan its monitoring and evaluation activities.
- iii. The service provider must always conduct themselves in a manner that does not bring disrepute to the HSRC or its clients.
- iv. The confidentiality and security of all procedures, forms, questionnaires, and datasets must be always safeguarded.

NB: All bidders must include a company profile in their submission, along with their Business Registration Certificates. Failure to comply with requirements, the bidder will not be considered for evaluation.

Please ensure that in your submission you address all the requirements as stipulated in the evaluation criteria. Failure to do so will result in either being disqualified from consideration or will reduce your assessment score.

4. TERMS AND CONDITIONS

In terms of the bid process, on being appointed as a service provider, the successful bidder enters into an agreement with the HSRC, the terms and conditions of which include these specifications and key aspects of the service provider's proposal. The HSRC agreement constitutes part of the bid, and the service provider is required to familiarise itself with its terms and sign and return all relevant agreement documents.

5. THE HSRC IS RESPONSIBLE FOR

- i. Providing the names and contact details of the stakeholders in the respective sectors. The service provider is expected to supplement this to source the appropriate stakeholders.
- ii. The HSRC in collaboration with the ETDP SETA will provide an introductory letter to potential respondents.
- iii. Assist with access to the various institutions and organizations if, where, and when needed.
- iv. Developing the research instruments (questionnaire, information, and consent forms), administration forms, and procedures (methodology).
- v. Gaining research ethics clearance certification.
- vi. Developing and providing basic training around the key concepts being investigated, the methodology, and ethics.
- vii. Monitoring the data collection to satisfy itself and the project steering team that the methodology has been adhered to in its finest detail and that the data quality is the best possible.

- viii. Data ownership, processing, and storage.
- ix. Review draft reports and provide feedback.

ANNEXURE B

6. EVALUATION CRITERIA THAT WILL BE APPLIED

Functionality	Weight
<p>6.1 Substantive experience and reputable track record in national/provincial data collection (preference in higher education sector and university institutions)</p> <p>6.1.1. A minimum of 2 years' relevant national fieldwork experience by the company. Provide evidence of previous relevant projects recently completed (10) at a similar scale to this study.</p> <ul style="list-style-type: none"> a. 2-5 years =3 Points b. 6-8 years =7 Points c. 9 years and above =10 Points <p>6.1.2. Provide CVs with details of qualifications and relevant experience of the project lead team to be assigned to the HSRC (10)</p> <ul style="list-style-type: none"> a. Project Leader with (5 years' experience) =5 Points b. All Core Project team members should have at least 5 or more years' experience= 5 Points <p>6.1.3. Provide 3 contactable references where similar work was done in the last five years (10)</p> <p>References letters and contact details (name of contact person, with telephone/cellphone number and e-mail address) of at least three clients for whom such relevant large-scale fieldwork has been undertaken within the last five years, including detail of the nature, participant numbers and data volumes applicable to each project on a company letter head.</p> <p>3 points for 1 reference letter 5 points for 2 reference letters 10 points for 3 reference letters</p>	30
<p>6.2. Methodology:</p> <p>6.2.1. Submit a project proposal outlining the following:</p> <ul style="list-style-type: none"> - Understanding of the Terms of Reference - Methodology/Approach to undertaking this assignment, aligned to the project specifications. = 10 Points 	35

Functionality	Weight
<p>6.2.2. Provide the appropriate project execution plan and implementation plan demonstrating the organization's ability and how they plan to successfully complete the project within the period defined. = 10 Points</p> <p>6.2.3 Provide details of methodology for ensuring quality assurance = 5 Points</p> <p>6.2.4 Provide details for how the for online Computer Assisted Telephonic Interviews (CATI) will be conducted= 10 Points</p>	
<p>6.3 Capacity: Provide the following:</p> <p>6.3.1 Details about facilities, which shall include but not limited to computers, tablets, telephones and workstations and internet connectivity which shall be employed to successfully complete the project; = 10 Points</p> <p>6.3.2 Headcount and minimum experience/expertise of interviewers/field workers. =5 Points Minimum headcount and experience/qualifications of project supervisors, for qualitative and quantitative data collection=5 Points</p> <p>6.3.3 Details pertaining to data protection (back-up & restoration) systems and procedures = 10 Points</p>	30
<p>6.4 Financial capability: Sustainability, stability and liquidity of your organisation, derivable from:</p> <p>6.4.1 Financial statements for the past two years. = 5 Points</p>	5
TOTAL	100

NB: The minimum threshold on functionality is 70% to qualify for further evaluation stages.

7. Preferential Point System: 80/20

Technical enquiries must be directed to Ms. Mmatsetlane Maja, email: mmaja@hsrc.ac.za
Quotes to be submitted to Zanele Nkosi: znkosi@hsrc.ac.za

Closing Date :12 January 2024@16:00