



TERMS OF REFERENCE

Terminal Evaluation of the Comprehensive HIV Prevention Programme for transgender people in South Africa
February 2022

MSM-TG

| 1.SUMMARY | |
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| Title | HIV Prevention Programme for Transgender |
| Reference | MSM-TG – HIV Prevention – 02-2022 |
| Description (Summary for website - 100 words max) | Beyond Zero seek the services of a firm/ individual consultant to undertake a terminal evaluation of the Comprehensive HIV Prevention Programme for Transgender people in South Africa |
| Submission by email only to | msmtg-procurement@beyondzero.org.za |
| Closing date for enquires/bid clarification | All technical enquiries must be emailed to raymond@beyondzero.org.za NOT later than 02 March 2022@13H00 |
| Submission must include | <ol style="list-style-type: none"> 1. Detailed Proposal including programmatic information 2. Company profile where applicable 3. B-BBEE certificate (<i>Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor/Valid Sworn Affidavit together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.) if applicable</i>) 4. SARS Tax Clearance Certificate/Tax Compliance Letter 5. VAT Registration Certificate or VAT Registration Letter ("VALUE ADDED TAX Notice of Registration") available on e-Filing for all expenditure more than R1 million if applicable 6. Confirmation of banking details 7. Signed Code of Conduct for Suppliers of Services 8. Completed and Signed Declaration of Interest |
| Deadline for submission | 08 March 2022 @13H00 |

1. SUMMARY OF THE TRANSGENDER PROGRAMME TERMINAL EVALUATION

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| 1.1 Purpose: | The main purpose of this evaluation will be to assess programme impact, outcomes, outputs and the implementation of the comprehensive programs for the transgender (TG) people. |
| 1.2 Partners: | Beyond Zero (Global Fund Principal Recipient), the South African National AIDS Council (SANAC), TG Programme Implementers (Sub-Recipients and Networks). |
| 1.3 Duration: | 28 days |
| 1.4 Estimated Dates | 01 st to 30 th March 2022 |
| 1.5 Geographical Location | 4 districts: Capricorn (Limpopo province), Garden Route (Western Cape province), Gert Sibande (Mpumalanga province) and Mangaung (Free State province). |
| 1.6 Target Population: | Transgender people |
| 1.7 Deliverables: | Comprehensive Inception, Draft and Final Evaluation Reports |
| 1.8 Methodology: | An evaluation technique that will employ both Quantitative and Qualitative Approaches. |
| 1.9. Evaluation Management Team: | Representation from Beyond Zero, SANAC, and TG communities |

2. THE PROJECT CONTEXT AND BACKGROUND

The South Africa Global Fund Country Coordinating Mechanism (GF CCM) is responsible for overseeing the implementation of HIV and TB programmes funded by the Global Fund to Fight AIDS, TB and Malaria (GF) in the country. The GF CCM develops priorities for the programmes, determines envelop for disease split (HIV and TB), and ensures that the programme deliverables are met.

The GF CCM has appointed Beyond Zero (BZ) NPO as one of the Principal Recipients (PRs) for the 2019 – 2022 funding cycle. In turn, BZ has appointed sub-recipients (SRs) to implement comprehensive HIV prevention programme activities targeting transgender (TG) people. The comprehensive packages of health and social care and services are provided via a tiered approach into three levels:

| | |
|---------|---|
| CORE | Offered to all TG people reached, directly provided by sub-recipients (SRs) in the Global Fund programme |
| LAYERS | Offered to some TG people (needs basis), directly provided by SRs in the Global Fund programme |
| LINKAGE | Offered to some TG people (needs basis), provided by government/ other partners. Referral, linkage and follow-up by Global Fund SRs |

TG Module

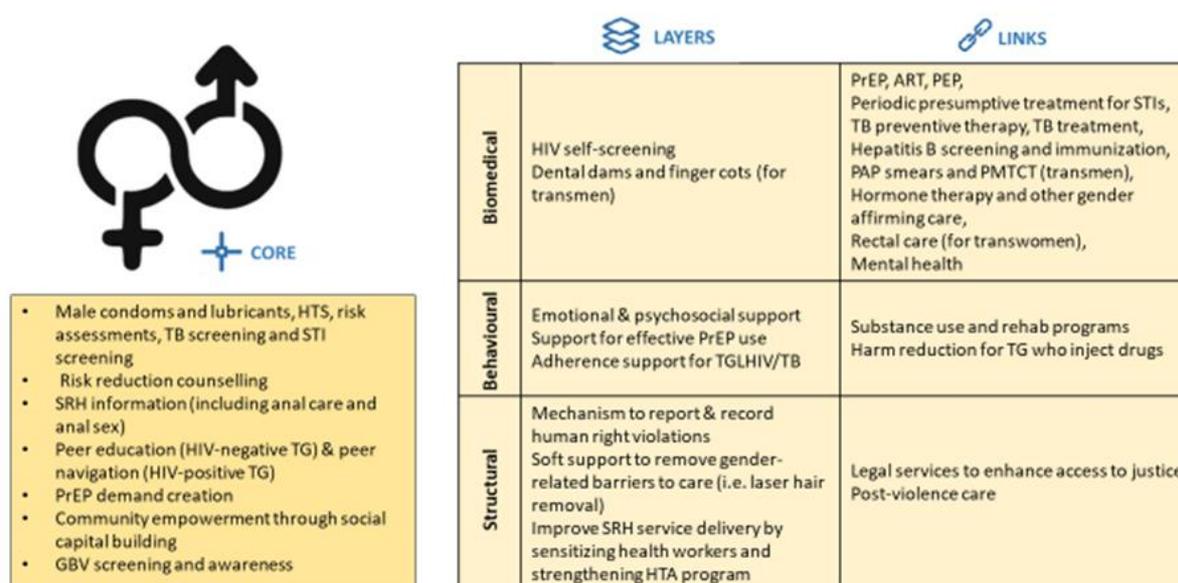
The programme aims to deliver a comprehensive, integrated, peer-led HIV/TB/SRHR package for TG in line with the NSP package, and the National LGBTI HIV Plan. The investment will reach 1,680 TG with a defined package of services, achieving 70% saturation in 4 priority districts (Table 1).

Table 1: Districts and provinces where the TG programme is implemented

| Province | District |
|--------------|--------------|
| Free State | Mangaung |
| Limpopo | Capricorn |
| Mpumalanga | Gert Sibande |
| Western Cape | Garden Route |

The TG programme model is delivered through a combination prevention programme approach to reduce the transmission of HIV, STIs and TB by tailoring a combination of biomedical, behavioural and structural interventions and the mode of delivery to the setting and population (Figure 1 below).

Figure 1: Combination Prevention Package for Global Fund TG Programme



3. EVALUATION PURPOSE, SCOPE AND DELIVERABLES

3.1 Purpose

Beyond Zero (BZ) and its partners are committed to upholding accountability and learning to their communities. The evaluation of the TG programme will provide information, learning and accountability to the donor (Global Fund), SANAC, Principal Recipient, Sub Recipients, Networks and more importantly to the communities. This evaluation is expected to assess programme impact, outcomes, outputs and the implementation of the comprehensive programs for TG people.

The evaluation results will be shared with Global Fund, SANAC, Sub Recipients, Networks and the community, which will be expected to guide and inform next TG programming in South Africa. The evaluation will also assess the performance of the programme against key parameters including the programme's relevance, effectiveness, efficiency, sustainability, organisational learning and best practices; partnerships and stakeholder management.

3.2 Broad Objective

The broad objective is to evaluate the extent to which TG Programme contributed to the reduction of new HIV infections, AIDS related mortality and self-reported stigma and discrimination related to HIV/AIDS among TG people in South Africa.

3.3 Specific Objectives

- 3.3.1 To examine the comprehensiveness of the prevention programme for TG people.
- 3.3.2 To appraise the comprehensiveness of prevention programme for TG people.
- 3.3.3 To evaluate the comprehensiveness of prevention programme for TG people.
- 3.3.4 To determine the literacy levels on Human Rights related to HIV and barriers to accessing health services and justice among for TG people.
- 3.3.5 To evaluate Human Rights Violations and Response Mechanism among programme for TG people.
- 3.3.6 To appraise the extent to which the programme enhanced the capacity of the Sub-recipients to implement Global Fund Programmes.

3.4 Scope of Work (SOW)

The Global Fund HIV Grant implemented by Beyond Zero focusses on providing comprehensive preventions programme for TG people as per the relevant National Policies and Guidelines, in line with the NSP package, and the National LGBTI HIV Plan.

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| 3.4.1 | TG Programme Implementation Start date: April 2019; End date: March 2022. |
| 3.4.2 | Geographical Coverage - 4 districts: Capricorn (Limpopo province), Garden Route (Western Cape province), Gert Sibande (Mpumalanga province) and Mangaung (Free State province). |
| 3.4.3 | Target groups: The primary target group will be TG people reached by the programme in the four districts. |
| 3.4.4 | Expected Outputs: |
| 3.4.4.1 | A technical and financial response to the call for applications outlining the understanding of the task, detailing the evaluation methodology, data analysis plan, work plan with tentative timelines and summary budget. |
| 3.4.4.2 | Initial discussions with the consulting firm on the evaluation work plan, methodology and logistics. This will lead to the approved work plan and road map with clear timelines. |
| 3.4.4.3 | An inception report of the desk review prior to field work to demonstrate a clear understanding and a practical work plan for the evaluation. |
| 3.4.4.4 | Meeting with Evaluation Management team to discuss inception report and provide feedback. |
| 3.4.4.5 | Submission of appropriate tools, approaches and plan for data collection as well as data analysis plan for input and approval by the Evaluation Management team. |
| 3.4.4.6 | Seek for ethical clearance from a reputable Ethical Review Committee. |
| 3.4.4.7 | Conduct field data collection, data analyses and report writing (guide will be shared for report writing). |
| 3.4.4.8 | Submission of the draft evaluation report to BZ and Evaluation Management team for review and feedback. |
| 3.4.4.9 | Validation meeting with BZ programme team, SRs, TG Networks, and SANAC to discuss the draft evaluation report and provide feedback. |
| 3.4.4.10 | Dissemination of the final evaluation report to the South African Coordination Mechanism. |
| 3.4.4.11 | Submission of the final evaluation report to BZ, including: |

| | |
|--------------|---|
| | i. Databases of raw and cleaned data (both qualitative and quantitative, including copies of data sets with codebook as appropriate). |
| | ii. All recorded material including video and audio recording and photos. |
| | iii. A logical inventory of material handed over. |
| | iv. BZ will have sole ownership of all final data and any findings shall only be shared or reproduced with the permission of BZ. |
| 3.4.5 | Deliverables: The evaluation will be phased with deliverables at intervals that will be discussed and agreed with the consulting firm. However, at the minimum: |
| 3.4.5.1 | Submission of the Inception report (Evaluation Management team will share a guide for compiling the report). |
| 3.4.5.2 | Ethical approval from a reputable Ethical Review Committee |
| 3.4.5.3 | A draft and final end of project evaluation report (Evaluation management team will share a guide for compiling the report). |
| 3.4.5.4 | Sharing the draft report in a validation meeting consisting of BZ Programme Team, SANAC Representatives, Implementing SRs, and TG Networks. |
| 3.4.5.5 | Dissemination of the final evaluation report to South Africa Country Coordination Mechanism (CCM). |

All written documentation is to be submitted in English using Microsoft Word in both soft and hard copy. All primary data collected, and analysis conducted for the purpose of the evaluation will remain the property of the Beyond Zero and must be submitted electronically and in a clear and comprehensible format in Excel. No parts of this evaluation exercise, whole or part, shall be published without prior written approval of Beyond Zero.

4. EVALUATION CRITERIA AND KEY QUESTIONS

The evaluation process focuses on, but not limited to the following:

4.1 Relevance:

- 4.1.1 To what extent did the program address the beneficiaries needs?
- 4.1.2 What has been in particular useful for the target beneficiaries?
- 4.1.3 How relevant were the interventions to county/national government priorities?

4.2 Effectiveness:

- 4.2.1 To what extent did the programme achieve the expected results (output and outcomes)?

4.2.2 What changes can be attributed to the programme (positive, negative, expected and unexpected)?

4.2.3 Was there any need to adjust the programme response to the changes in the programme environment? If yes, what adjustments were made and were they timely?

4.3 Efficiency

4.3.1 Were all activities undertaken on time as planned?

4.3.2 Were all activities done within the budget? If there were any significant variances (whether early or late, over or under expenditure), what were the causes?

4.3.3 How did the efficiency affect the effectiveness of the programme?

4.4 Impact

4.4.1 What is the extent to which the programme contributed to the intended results among the TG people?

4.4.2 What is the contribution of the intervention elements (condom distribution and use, STI screening and treatment, HTS, HIV treatment, HIV PrEP, etc.) in the reduction new HIV infections and AIDs related deaths and on legal literacy and on the improvement of enabling environment and reporting of Human Rights Violation cases among key population?

4.4.3 What is the extent to which the program contributed to the intended results among the the TG people?

4.4.4 Are there positive or negative changes in the community, which can be attributed to the programme?

4.4.5 Are there any lessons learnt and good practices that can be deduced from the programme?

4.5 Sustainability:

4.5.1 What measures were put in place to ensure programme sustainability?

4.5.2 Does the programme have an exit or sustainability strategy?

4.5.3 To what extent did socio-cultural factors affect the uptake of programme interventions? And what measures were taken to address the same?

4.5.4 To what extent have the benefits of the programme expected to be or sustained after completion of the programme?

4.5.5 What are the recommendations for similar support in the future?

4.6 Stakeholders Participation and Accountability

- 4.6.1 How much did the beneficiaries understand the programme?
- 4.6.2 How much were beneficiaries involved in the programme decision making?
- 4.6.3 What strategies were used for beneficiary communication and complains mechanism?
- 4.6.4 What were the respective responsibilities and contributions of donor partners, SANAC, PR, SR and other local partners?
- 4.6.5 To what extent were the interventions integrated into the South African Government National programmes, policies and orientation?
- 4.6.6 To what extent was capacity building of the implementing SRs done and what were their positive and negative effects?

5. EVALUATION METHODOLOGY APPROACHES

Beyond Zero highly recommend that the evaluation firm considers effective approaches and design that respond to the evaluation objectives and scope of this assignment, which should take into account the available programme data throughout the programme cycle. However, additional and effective approaches may be recommended to meet the data requirements for the evaluation as agreed with BZ and evaluation management team.

The evaluation firm will also be required to recommend sampling techniques for the evaluation, which adheres to the laws of Statistical Regularity and Inertia of large numbers. All findings should be scientific, evidenced and critically evaluated for validity and reliability. The data collection and analysis methods must be comprehensively and explained in the reports.

BZ will support with sampling, but the following must be accounted for:

- a. A sufficiently representative sample of sites that considers the geographical context - rural/urban/peri-urban locations to ensure that a good combination of sites is used for the evaluation.
- b. A sufficiently representative sample of evaluation participants at all levels of the programme, including PEs, TG People, and site coordinators and programme managers at the selected sites
- c. Data collected per site and time needed to collect sufficient data.
- d. A cost-effective evaluation budget.

Key informant interviews are to be conducted with the Site Coordinators and Programme Managers of the SRs, as well as any other stakeholders identified in the mapping.

5.1 Evaluation Quality and Ethical Standards

The evaluation firm shall take all reasonable steps to ensure that the evaluation is designed and conducted to respect and protect the rights and welfare of TG people and communities involved and to ensure that the evaluation is technically accurate and reliable; is conducted in a transparent and impartial manner, and contributes to organizational learning and accountability. The firm will be required to seek for ethical approval prior to the commence of data collection process. In addition, the evaluation team shall be required to adhere to the evaluation standards and applicable practices as recommended by the Global Fund.

6. EXPECTED SERVICE PROVIDER EXPERIENCE, QUALIFICATIONS AND COMPETENCIES

For the purposes of this evaluation, the evaluation firm should have extensive experience and knowledge in key population programming, human rights and gender, social research, health programs including HIV and AIDS, working with disadvantaged population/communities, or other related fields.

Applications from companies/organisations and individuals will be assessed on their ability to demonstrate the following qualifications and competencies:

- a. Advanced university degree in Economics, Public Policy, Social Sciences, Public Health, and/or a related technical field.
- b. Strong knowledge of the South Africa HIV and TB epidemic and national response, the legislative, and policy environment including the National Strategic Plan on HIV, STIs and TB (2017-2022).
- c. A minimum of 5 – 10 years' experience in development, public health and monitoring and evaluation of HIV, TB and STI programs in South Africa including laws and policies, and political context.
- d. Extensive experience in working with Key Populations in South Africa, including focus on services for TG people.
- e. Good track record of conducting similar reviews.
- f. Expertise in quantitative data analysis techniques including employing rigorous statistical methods for large data sets.
- g. Experience in conducting data collection during the COVID-19 pandemic to ensure safety of both researchers and respondents is a critical requirement
- h. Excellent English writing skills and evidence of this ability.

Desirable attributes include:

- a. Proven project management skills.
- b. Organizations from the LGBTI sector are encouraged to apply.
- c. All team members should be fluent in spoken and written indigenous languages and English
- d. 3 years' experience in multisectoral HIV prevention programming or HIV prevention programmes that utilise combination prevention strategies to HIV prevention.
- e. 3 years' experience working with Global Fund, civil society, SANAC and other government departments and related institutions dealing with HIV.
- f. Excellent skills and experience in evaluation approaches for key population including MSM, TG and sex workers.
- g. Demonstrated knowledge and skills in data collection, analysis and report writing.
- h. Respect for diverse culture, religion and gender issues.
- i. Ability to work in highly political environments.
- j. Ability to deliver high quality work within tight timelines.

7. INSTITUTIONAL ARRANGEMENTS/MANAGEMENT OF THE EVALUATION

The day-to-day management of the service provider will be handled by BZ under the GF grant. Therefore, service provider will work closely with key BZ technical staff who will provide relevant information and provide inputs into all stages of the consultants' assignment.

- a. The BZ Programme Director would be the overall supervisor of the assignment. Day-to-day activities will be managed by the SI Technical Lead, supported by the MSM/TG Technical Lead.
- b. The service provider will actively engage BZ programme staff, SANAC technical staff and SR staff in all the steps and processes of the evaluation to ensure complete transfer of knowledge upon the completion of the assignment.
- c. BZ will render all support in terms of institutional arrangements not limiting to issue of office orders, arrangements of meetings, and necessary logistics during the field visits for the service provider and other such facilities deemed necessary for the smooth completion of the assignment.
- d. The SI Technical Lead and MSM/TG Technical Lead will ensure introduction to implementing partners and other key stakeholders.
- e. The SI Technical Lead will consolidate comments and feedback on, and approval of, all deliverables within agreed timelines.

7.1 Deliverables and timelines

The agreed upon methodology will be detailed in the workplan. It is anticipated that most of the data collection will align to the relevant lockdown restrictions applicable at the time of fieldwork. This may require a hybrid of virtual and in person approaches. The applicants might indicate how they will adjust to the COVID-19 related quarantine measures and lockdown restrictions. In general, the workplan should be feasible and adaptable to geographic context. It is anticipated that the applicant will work with a team to allow for simultaneous data collection in the four districts and with key national stakeholders.

Table 2: Deadlines, deliverables and level of effort (LOE)

| Product (Deliverable) | Description | Estimated days | Timeline(s) |
|---|---|----------------|-------------|
| PHASE: APPOINTMENT AND PLANNING | | | |
| Briefing meeting BZ's programme team. | <ul style="list-style-type: none"> No later than 2 working days after the acceptance of the consultancy | 0.5 | |
| Key deliverable 1: Inception report | <ul style="list-style-type: none"> Inception report which includes a detailed workplan outlining agreed upon key activities, major milestones and methodology | 4.5 | |
| Key deliverable 2: Draft Fieldwork plan | <ul style="list-style-type: none"> Consultant to prepare a comprehensive workplan, in consultation with BZ technical staff and identified SRs Fieldwork planning and set up Fieldwork plan submitted | | |
| Key deliverable 3: Meeting with Evaluation Management Team | <ul style="list-style-type: none"> Consultant to prepare detailed presentation for the Evaluation Management Team comprising of representatives from BZ, SANAC, and TG networks. | 1 | |
| Key deliverable 4: Finalise draft data collection instruments and fieldwork plan | <ul style="list-style-type: none"> Review and update draft data collection instruments and fieldwork plan based on inputs from the Evaluation Management Team | 2 | |
| PHASE: DATA COLLECTION | | | |
| Key deliverable 5: Fieldwork team trained | <ul style="list-style-type: none"> Training of fieldwork team | 0.5 | |

| | | | |
|---|---|----------------|--|
| Key deliverable 6: Fieldwork report | <ul style="list-style-type: none"> Data collection and capturing | 10 | |
| PHASE: ANALYSIS AND REPORTING | | | |
| Key deliverable 7: First draft report – MS Word and PPT presentation | <ul style="list-style-type: none"> Data cleaning and analysis Draft report submitted and presented to BZ and other selected SR representatives in order to validate the outputs | 5 | |
| Key deliverable 8: Final evaluation report and related products | <ul style="list-style-type: none"> Submit final report and appendices incorporating feedback from BZ and other selected SR representatives Final evaluation report and related products including executive summary, all tools and final presentation | 4 | |
| Key deliverable 12: Dataset with codebook | <ul style="list-style-type: none"> Submit to BZ all hard copy forms for data submission and soft copy in a flush disk. | 0.5 | |
| Total days for project completion. | | 28 days | |

7.2 Requirements

7.2.1 All the above documents should be submitted as follows:

- Electronic copies in Microsoft Word and PDF formats (or other acceptable format such as MS Excel)
- Hard copies delivered to the East London Office

7.2.2 Inception Report should be submitted in soft copy

7.2.3 All hard copy forms for data submission and soft copy in a flush disk

7.2.4 A soft copy Draft Evaluation Report, editable for review and inputs

Final Evaluation Report, well visualized - 5 hard copies (Gloss paper and perfect book bound) and soft copy in a Flash Disk, including the PowerPoint presentation used during disseminations.

7.3 Roles of the consultant

7.3.1 Respond to the TOR with clear methodology, work plan and budget.

7.3.2 Undertake the desk review and develop literature review.

7.3.3 Design the evaluation methodology, sample and tools.

- 7.3.4 Development of inception report.
- 7.3.5 Develop evaluation protocol for ethical approval.
- 7.3.6 Sensitize research team for data collection.
- 7.3.7 Conduct KI interviews, data analysis, report etc.
- 7.3.8 Develop and submit the draft and final evaluation report.
- 7.3.9 Develop study dissemination pack and facilitate actual dissemination.
- 7.3.10 Share all the data sets with Beyond Zero

8. SUBMISSION OF PROPOSALS

There will no briefing meeting for this call for proposals. However, questions for clarity on the TOR can be submitted via email to raymond@beyondzero.org.za on or before 13H00 on 02 March 2022.

No telephonic enquiries will be accepted.

All submissions must be submitted to msmtg-procurement@beyondzero.org.za NOT later than 13h00 on 08 March 2022. Late submissions will not be considered. Please ensure the subject line reads: "Application – TG Terminal Evaluation".

The proposal should include the following and **should not be more than 15 pages long excluding appendices**, and in calibri font, size 11, 1.5 spacing. The bid documents must conform to the attached annexes:

8.1 See Annex 1 for the Technical Proposal Format

8.2 See Annex 2 for the Budget Template

8.3 See Annex 3 for the Bid Evaluation Criteria

Please note that short-listed candidates must be available immediately.

9. SCOPE OF PRICE AND PAYMENT SCHEDULE

9.1 Consultants shall quote an **all-inclusive daily fee for the contract period**. The term "all-inclusive" implies that all costs (professional fees, communications, consumables, etc.) that could be incurred by the consultant in completing the assignment are already factored into the daily fee submitted in the proposal.

9.2 BZ will facilitate the travel costs for economy class airfare and daily subsistence allowance for field visits within the work station for all field visits.

9.3 Payments shall be done as reflected below upon verification of completion of deliverables and approval by the BZ Programme Director against the agreed time line. A portion of the agreed fee shall be payable upon submission of agreed deliverables: approximately 1/12 of the agreed sum will be paid per deliverable submitted (12 deliverables). This may be negotiated at the time of developing the service level agreement.

10. AWARDING OF THE CONTRACT

- a. BZ will select the service provider. The selection committee reserves the right to request any, or all, of the bidders to meet to clarify their proposal.
- b. The Committee is not bound to accept the lowest or any proposal.
- c. The proposal will be evaluated against the provided review matrix.
- d. The Committee may, entirely at its discretion, decide to:
 - Award contracts to different bidders for different sections of the scope of work.
 - Award contracts for particular sections of the scope of work, but invite new proposals for other sections of the work.
 - Delay the award contracts for certain sections of the scope of work (taking into account, inter alia, timing of funding availability).
 - Make award of contracts subject to such conditions as BZ may determine at the stage of awarding the contracts.
- e. The Service Provider may be required to sign the Beyond Zero's or Global Fund's Code of Conduct for Service Providers should they be contracted.

ANNEX 1: TECHNICAL PROPOSAL FORMAT

1. **Introduction:** description of the firm, the firms' qualification and statutory compliance. <Max 2½ pages>.

- Company Registration Documents if applicable
- Three contactable references and two samples of work,
- Detailed Proposal including programmatic information
- Company profile if applicable
- B-BBEE certificate (***Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor/Valid Sworn Affidavit together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.***) if applicable
- SARS Tax Clearance Certificate/Tax Compliance Letter if applicable
- VAT Registration Certificate or VAT Registration Letter ("VALUE ADDED TAX Notice of VAT Registration") available on e-Filing for all expenditure more than R1 million if applicable
- Confirmation of banking details
- Signed Code of Conduct for Suppliers of Services Completed and Signed Declaration of Interest

2. **Back ground:** Understanding of the project, context and requirements for services, key questions. <Max 2 pages>.

3. **Proposed methodology:** Describe the proposed design for the evaluation. Indicate methods to be used for each objective and highlight any areas where adjustment may be recommended. The targeted respondents should be indicated for each objective. Proposed detailed questions should be indicated. Detailed sample size, calculation methods and sampling procedure needs to be indicated. <Max 5 pages>.

4. **A capability statement:** Firms experience in undertaking assignments of similar nature and experience from the geographical area for other major clients (Table of: Name of organization, name of assignment, duration of assignment (Dates), reference person contacts). <Max 2 pages>.

5. **Proposed team composition** as per the table below. <Max 1 page>.

| Name of Team Member | Highest Level of Qualification | General Years of Experience related to the task at hand | Number of days to be engaged | Roles under this assignment |
|---------------------|--------------------------------|---|------------------------------|-----------------------------|
| | | | | |
| | | | | |
| | | | | |

6. **Work plan** (Gantt chart of activity date/period of implementation <Max 2 pages>)

6.1 Disclosure - Conflict of Interest. Please disclose details of any circumstances, including personal, financial and business activities that will, or might, give rise to a conflict of interest or state that there are none. Where the bidder identifies any potential conflicts they should state how they intend to avoid such conflicts. BZ reserves the right to reject any proposal which, in BZ's opinion, gives rise, or could potentially give rise to, a conflict of interest. <Max½ page>.

ANNEX 2: BUDGET PROPOSAL FORMAT

The consultant shall quote for all the items using the template below. BZ reserves the right to manage other related costs (such as travel and logistics. The quote should include including daily fees for each staff member/consultant and breakdown of all other costs to be charged to the contract. The prospective Service Provider must submit a price exclusive of VAT for all activities proposed in the application.

| Items Description | Unit | # of units | Unit cost (ZAR) | Total cost (ZAR) | Justificaation of unit cost |
|--|------|------------|-----------------|------------------|-----------------------------|
| e.g. Consultancy Fee | | | | | |
| e.g. Office expenses (Printing, graphic design, photocopy, binding, communication costs etc.) | | | | | |
| | | | | | |
| Grand Total | | | | | |

NOTE: It is recommended that this be done in an MS Excel sheet and the detailed budget submitted in electronic format.

ANNEX 3: BID EVALUATION CRITERIA

1. CRITERIA FOR SELECTION OF THE CONSULTANTS

- a. **Administrative compliance:** The award of the contract will be made to the service provider whose proposal has been evaluated and determined as responsive/compliant/acceptable based on the guidance provided above (see Technical proposal format and Budget template).
- b. A three-stage evaluation procedure will be used to evaluate all proposals from bidders that meet the Administrative compliance. The total number of points for each stage is as follows:

| | |
|--------------------------------|-------------------|
| Administrative compliance pass | Pass (not scored) |
| Technical proposal | 60 points |
| Oral presentation | 30 points |
| Financial Proposal | 10 points |
| Total Score | 100 points |

- c. Only candidates obtaining a minimum of 63 points (70%) out of a maximum 90 points on the Technical Evaluation (proposal plus oral presentation) will be considered for the Financial Evaluation.

2. ADMINISTRATIVE COMPLIANCE ELIGIBILITY CRITERIA

Applicants will have to be a legal entity registered in South Africa with the right to enter a contractual agreement with Beyond Zero. The applicant must have no history of legal proceedings related to fraud or corruption. The applicant must be a qualified entity (firm/company/individual) with:

- Three contactable references and two samples of work,
- Detailed Proposal including programmatic information
- more than R1 million
- Confirmation of banking details
- Signed Code of Conduct for Suppliers of Services Completed and Signed Declaration of Interest
- Three contactable references
- Two reports of previous assignments (Soft/PDF copies)

Note: Only applications meeting all the above eligibility requirement will move to the tender evaluation.

3. EVALUATION OF THE TECHNICAL PROPOSAL

The technical proposal shall be evaluated on the basis of its responsiveness to the Terms of Reference. Specifically, the following criteria shall apply:

| Evaluation Criteria | Maximum Points | Bidder's score | Remarks |
|---|----------------|----------------|---------|
| Introduction: Compliance to the Terms of Reference, clear description of the firm and its qualifications. | 5 | | |
| Background: Understanding of the project, context and requirements for services | 10 | | |
| Proposed Methodology: The proposed methodology MUST provide an indication of its effectiveness and added value in the proposed assignment. Review the previous reports submitted. | 15 | | |
| Firms Experience: in undertaking assignments of similar nature and experience from related geographical area for other major clients. Provide information on overall years of experience, relevant technical expertise, previous experience in ethical clearance and working with key population communities. 10 Years = 15 points 5 Years = 10 Points 3 Years = 5 points | 15 | | |
| Proposed Team Composition: 1. Tabulate the team composition to include the general qualifications, suitability for the specific task to be | 5 | | |

| | | | |
|---|-----------|--|--|
| <p>assigned and overall years of relevant experience to the proposed assignment.</p> <p>2. The proposed team composition should balance effectively with the necessary skills and competencies required to undertake the proposed assignment.</p> <p>3. Lead Consultant Qualifications - should be as per the TOR</p> | | | |
| <p>Work Plan: A Detailed logical, date/ period of work for the assignment MUST be provided.</p> | 10 | | |
| TOTAL SCORE | 60 | | |

Any firm with at least a score of 42 (70%) from the technical evaluation, will proceed and invited for the second stage - oral presentation.

4. ORAL PRESENTATION

| Criteria | Maximum Points | Bidders Score | Remarks |
|---|----------------|---------------|---------|
| Understanding of the assignment and clarity on the proposed methodology | 15 | | |
| Roadmap is realistic and aligned to the Methodology | 10 | | |
| Presentation of: detailed CVs of team to be involved | 5 | | |
| Total | 30 | | |

For the firm to proceed to the last stage the financial proposal opening and evaluation, the minimum score must be 63 (70%) of the combined technical proposal and the oral presentation.

5. FINANCIAL PROPOSAL EVALUATION

The Procurement Review Committee (PRC) evaluate the price of the succesful bidders that reached the threshold on both the Technical and Oral presentation.