



UNIVERSITIES SOUTH AFRICA

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO DESIGN, DEVELOP AND IMPLEMENT AN INTEGRATED MONITORING AND EVALUATION SYSTEM FOR THE ENTREPRENEURSHIP DEVELOPMENT IN HIGHER EDUCATION (EDHE) PROGRAMME

1. Purpose

The purpose of these Terms of Reference is to appoint a suitably qualified and experienced service provider to design, develop and implement an integrated Monitoring and Evaluation (M&E) system for the Entrepreneurship Development in Higher Education (EDHE) programme. The service provider will develop the M&E framework, define indicators and data requirements, design standardised data collection and reporting tools, and establish a digital platform supported by interactive dashboards. The system will enable EDHE to consolidate, analyse and report on performance across its three strategic focus areas, programmes, projects and university-level interventions, with designated university representatives able to input data against agreed indicators. The service provider will guide and equip EDHE to administer and maintain the system, while responsibility for ongoing data collection, validation, analysis and reporting will remain with EDHE, supported by participating universities.

2. Background

Universities South Africa (USAf) is the representative body of South Africa's 26 public universities. It promotes collaboration across the university sector and advances policies and initiatives that strengthen higher education's contribution to national development. Through its programmes and strategic engagements, USAf supports universities in responding to societal and economic priorities, including graduate preparedness, entrepreneurship, innovation and broader economic participation. The Entrepreneurship Development in Higher Education (EDHE) programme is implemented by USAf with support from the Department of Higher Education and Training (DHET). EDHE seeks to strengthen entrepreneurship development across the public university sector through three strategic focus areas: student entrepreneurship, entrepreneurship teaching and learning, and entrepreneurial universities. These focus areas support students and graduates in developing entrepreneurial capabilities and creating enterprises, while encouraging universities to embed entrepreneurship within their curricula, institutional structures, policies and cultures.

EDHE delivers its mandate through interconnected programmes, projects and institutional interventions. These include Communities of Practice (COPs), the Student Women Economic Empowerment Programme (SWEEP), Entrepreneurship Activation Offices (EAOs), the Studentpreneurs Indaba, entrepreneurship and innovation competitions, and initiatives supporting entrepreneurship education and institutional leadership. Implementation involves collaboration with university representatives, students, academics, institutional leaders, funding partners and other ecosystem stakeholders.

The breadth of this portfolio creates a need for an integrated Monitoring and Evaluation (M&E) system that provides a consolidated view of programme implementation and results. The system must enable EDHE to monitor activities, participation, targets, milestones and resources, alongside changes in entrepreneurial capabilities, venture development and the institutionalisation of entrepreneurship. It must also support analysis across programmes, universities and reporting periods, while distinguishing unique beneficiaries from repeated participation in different interventions.

USAf therefore seeks to appoint a service provider to develop an M&E framework and supporting digital system, incorporating standardised data collection tools and interactive dashboards. The system will enable designated university representatives and EDHE staff to input data against agreed indicators, with EDHE responsible for ongoing coordination, validation, analysis and reporting. The assignment will include system testing, training, documentation and handover to equip EDHE to operate the system and use its evidence for programme improvement, accountability and strategic decision-making.

3. Special Conditions

No service may be rendered without an official purchase, signed contract, or appointment letter.

4. Scope of Work

The appointed service provider will be required to design, develop, test and implement an integrated M&E system for EDHE. The assignment will cover the M&E framework, data collection and reporting tools, digital platform, interactive dashboards, and training and handover necessary for EDHE to operate the system.

4.1. Inception and requirements assessment

The service provider will:

- Review relevant EDHE documents, programme plans, existing indicators, reporting templates and available datasets.
- Consult EDHE staff and selected university representatives to establish information needs, reporting responsibilities and system requirements.
- Assess the existing USAf technology environment, available licences and potential integration requirements.
- Produce an inception report setting out the methodology, workplan, proposed system architecture, implementation schedule and responsibilities.

4.2. Development of the M&E framework

The service provider will develop an M&E framework aligned with EDHE's three strategic focus areas: student entrepreneurship, entrepreneurship teaching and learning, and entrepreneurial universities. This will include:

- A programme theory of change and results framework linking interventions to outputs, outcomes and intended longer-term contributions.
- Common indicators applicable across EDHE, alongside indicators specific to individual programmes and projects.
- An indicator reference guide specifying definitions, calculation methods, units of measurement, disaggregation, data sources, reporting frequency, verification requirements and responsible persons.
- Methods and tools for tracking entrepreneurial capabilities, venture development, economic participation and institutional change over time.
- Procedures for data quality assurance, validation and the use of findings to inform programme decisions.

4.3. Design of standardised data collection tools and processes

The appointed service provider will:

- Develop user-friendly forms and templates for data input by EDHE staff and designated university representatives.
- Define the data points required for each programme, project and university-level intervention.
- Establish consistent records and identifiers for universities, programmes, activities, participants and ventures to support tracking and prevent double counting.
- Develop tools for baseline assessments, participant feedback and follow-up tracking, where required by the approved framework.
- Configure submission, review, correction and approval workflows, including reporting schedules and reminders.
- Enable supporting evidence to be uploaded or linked to relevant submissions and indicators.

4.4. Development of the integrated digital platform

The service provider will design and implement a central platform that:

- Consolidates information across EDHE programmes, projects, universities and reporting periods.
- Enables authorised users to capture, update, submit and review data according to their assigned roles.
- Supports both individual data entry and standardised bulk uploads.
- Includes validation checks, duplicate detection, audit trails and clear submission and approval statuses.
- Allows EDHE administrators to manage users and update programmes, indicators, targets and reporting periods.
- Provides appropriate access controls, protection of personal information, backup and recovery arrangements.
- Retains historical records and accommodates new initiatives and future programme phases.

The proposed technical solution must be compatible with USAf's operating environment. The service provider must specify the required software, hosting, licences, integrations and recurring costs for approval before development.

4.5. Development of dashboards and reporting functionality

The service provider will develop connected, interactive dashboards covering:

Dashboard	Minimum coverage
National overview	Consolidated performance, reach, target achievement, university participation, implementation status and key risks.
Strategic focus areas	Progress and results across EDHE's three strategic focus areas.
Programmes and projects	Performance of COPs, SWEEP, EAOs, Indaba, entrepreneurship and innovation competitions, and other agreed initiatives.
University profiles	Institutional participation, activities, beneficiaries, results and reporting status.
Beneficiary and venture tracking	Participation across interventions and changes in capabilities, venture performance and economic participation over time.
Partnerships and funding	Funding and non-financial contributions, budgets, expenditure and delivery against agreed commitments, based on information supplied by EDHE.

Dashboards must allow users to filter and examine information by relevant dimensions, including year, reporting period, university, programme, province and agreed demographic characteristics. They must display data completeness, approval status and the date of the latest update. The system must also support the generation and export of agreed management, institutional and funder reports.

4.6. Data preparation and migration

The service provider will:

- Assess the structure and quality of existing datasets supplied by EDHE.
- Agree with EDHE on the historical data to be incorporated.
- Map and import the agreed datasets, documenting transformations, gaps and unresolved quality issues.
- Reconcile imported records and dashboard totals against the source data.

The establishment of missing historical records or collection of new beneficiary data will remain EDHE's responsibility.

4.7. Testing, piloting and refinement

The service provider will:

- Pilot the system with EDHE staff and selected university representatives across an agreed set of initiatives.
- Test data entry, validation, approvals, access controls, calculations, dashboards and report generation.
- Demonstrate that participants and ventures can be tracked across interventions without double counting.
- Refine the system based on pilot feedback and resolve identified defects.
- Complete user acceptance testing against criteria agreed with EDHE and obtain sign-off before full rollout.

4.8. Training, documentation and handover

The service provider will:

- Train EDHE administrators and relevant staff to operate the system, manage data, maintain dashboards and generate reports.
- Provide practical user guidance and training for designated university representatives.
- Transfer administrative access, editable project files, system configurations, data models and other materials required for USAf to operate and maintain the solution.
- Document ownership, licensing and any third-party dependencies, ensuring that USAf retains control of its data and commissioned system components.

4.9. Post-implementation support

The service provider will provide a defined period of post-implementation support, including troubleshooting, correction of defects and assistance with initial system use. Bidders must specify the proposed support period, response times, inclusions and costs, and distinguish these from optional ongoing maintenance or enhancements.

5. Guidelines for Submission of Proposal

5.1. Submission address

The proposals for the envisaged project should be submitted to Lerato Makgonyane via the e-mail address: edhe@usaf.ac.za

5.2. Proposal format

Bidders must submit a succinct technical and financial proposal as one consolidated PDF document. The complete proposal, including the cover page, table of contents, CVs and annexures, must not exceed 20 pages. Proposals submitted as multiple documents or exceeding the prescribed page limit will be regarded as non-compliant.

The proposal must be structured as follows:

- a) Cover page: Bidder's name, contact details, proposal title and submission date.
- b) Table of contents.
- c) Executive summary: Overview of the proposed solution and the bidder's suitability to undertake the assignment.
- d) Understanding of the assignment: Demonstrated understanding of EDHE's requirements, including the distinction between establishing the M&E system and EDHE's responsibility for its ongoing operation, data collection and reporting.
- e) Proposed methodology and technical approach: Approach to developing the M&E framework, indicators, data collection tools, integrated digital platform and Power BI dashboards. This must address data quality, user access, security, integration, testing and provision for future expansion.
- f) Work plan, deliverables and timelines: Proposed implementation phases, milestones, deliverables, responsibilities and dependencies, including requirements for EDHE's input and approval.
- g) Composition of the proposed project team: Team structure, roles, allocation of responsibilities and availability, demonstrating appropriate M&E, system development, and data management.
- h) Relevant organisational and team experience: Evidence of comparable assignments involving systemic frameworks.
- i) Financial proposal: An itemised budget linked to deliverables, distinguishing once-off development costs from recurring software, licensing, hosting, maintenance and support costs. All assumptions, exclusions, optional costs and VAT must be clearly indicated.
- j) References for comparable projects: Contactable client references, with a brief description of the assignment, completion date and services delivered.
- k) Annexures: Concise CVs of key personnel and essential supporting information, within the overall 20-page limit.

5.3. Closing date and time

Proposals must be submitted by 8 November 2026 at 23h59. Late submissions will not be accepted or considered.

6. Duration of Contract

The project will commence as soon as the purchase order is issued.

7. Information

Additional information, as may be deemed appropriate, must be submitted.

8. Timeframes

The time frame for deliverables will be as per these terms of reference.

9. Adding Value

It is expected that potential service providers will critique the brief to add value where possible in the proposal to be submitted. Thus, the onus is on the service provider to add value to the brief by leveraging their specialised competencies for the project.

10. Cost of Submission of Proposal

USAf is not responsible for any costs incurred by the service providers in the process of developing the proposals. The submitted budget for this project must include all expenses incurred by the service provider.

11. Ownership of Intellectual Property Rights

The ownership of all intellectual property rights associated with this work will be vested within the USAf, for its exclusive use.

12. Criteria for Selection of Service Providers

Proposals will be evaluated in three stages:

- Stage 1: Evaluation of compliance with the administrative and mandatory submission requirements.
- Stage 2: Evaluation of functionality out of 100 points.
- Stage 3: Evaluation of qualifying bids on price and B-BBEE or applicable specific goals.

Bidders must achieve a minimum functionality score of 75 points out of 100 to proceed to the evaluation of price and B-BBEE evaluation. Bidders scoring below 75 points will not be considered further.

12.1 Functionality evaluation

Proposals that meet the administrative and submission requirements will be evaluated for functionality against the criteria below. The evaluation will assess the bidder's ability to develop an appropriate M&E framework and deliver a functional, integrated digital system that EDHE can operate and maintain.

Evaluation criterion	Aspects to be assessed	Weight
Understanding of the assignment	Understanding of EDHE's programme context, three strategic focus areas and university-level reporting requirements. Clear recognition of the service provider's responsibility to establish the system and EDHE's responsibility for ongoing data collection, validation, analysis and reporting.	10
Proposed methodology and M&E approach	Suitability of the approach to developing the M&E framework, results chain, indicators, baseline requirements, targets and standardised tools. Provision for programme-specific measures, outcome tracking, institutional change, data verification and prevention of double counting.	25
Technical solution and system sustainability	Appropriateness and feasibility of the proposed digital platform, central data repository and dashboards. Provision for user-friendly data input, validation workflows, access controls, security, integration, historical data migration, expansion and ongoing administration by EDHE. Clarity on licensing, ownership and technical dependencies.	25
Work plan, implementation and handover	Realistic sequencing, timelines, milestones and deliverables. Clear responsibilities and dependencies, with adequate provision for consultation, piloting, user acceptance testing, training, documentation, handover and post-implementation support.	15
Qualifications and experience of the proposed team	Relevant qualifications and demonstrated expertise in M&E framework development, system development, and data management. Clear allocation of roles, availability and an appropriate combination of skills to deliver the assignment.	15

Relevant organisational experience and references	Demonstrated delivery of comparable assignments involving M&E frameworks and digital monitoring or reporting systems. Evidence of successful implementation, supported by contactable client references. Experience in higher education or programmes involving multiple institutions will be considered relevant.	10
Total		100

12.2 Scoring scale

Each criterion will be rated on a scale of 0 to 5, based on the information and supporting evidence provided in the proposal.

Score	Description
0 – No response	The criterion is not addressed, or no relevant information is provided.
1 – Poor	The response demonstrates limited understanding or capability, with substantial gaps and insufficient supporting evidence.
2 – Partially meets requirements	The response addresses some requirements but contains material weaknesses, omissions or insufficient detail.
3 – Meets requirements	The response adequately addresses the requirements and provides sufficient detail and relevant evidence to demonstrate a feasible approach.
4 – Exceeds requirements	The response comprehensively addresses the requirements, with strong supporting evidence and practical measures that strengthen delivery.
5 – Excellent	The response is thorough, coherent and fully substantiated, demonstrating a highly suitable approach with clear measures to ensure successful implementation and sustainable operation.

The weighted score for each criterion will be calculated as follows:

$$\text{Weighted score} = \frac{\text{rating awarded}}{5} \times \text{maximum points for the criterion}$$

Bidders must achieve a minimum overall functionality score of 75 out of 100 to proceed to the next stage of evaluation. In addition, bidders must obtain a minimum rating of 3 out of 5 for both “Proposed methodology and M&E approach” and “Technical solution and system sustainability”, given their central importance to the assignment.

12.3 Guidance for evaluating experience

For the criterion relating to comparable assignments, points may be allocated as follows:

Comparable assignments supported by evidence	Points
No comparable assignment demonstrated	0
One comparable assignment	5
Two comparable assignments	10

Only bidders attaining the minimum functionality threshold will proceed to the price and B-BBEE evaluation. The bidder achieving the highest combined score for price and B-BBEE may be recommended as the preferred bidder, subject to administrative compliance, due diligence, and reference checks.

13. Compliance

13.1. The proposal must either conform to the minimum requirements as set out in this document, or it must be stated clearly how it deviates from these requirements and why. Proposals that strictly adhere to the specifications are preferred. Offers exceeding the minimum requirements of the specifications are acceptable. Minor deviations may be considered.

- 13.2. This document will be a binding contract between the successful service provider and USAf once the proposal has been accepted.
- 13.3. Service providers are at liberty to discuss any aspect of this request for proposal with the entity, and enquiries must be referred to:

Ms Lerato Makgonyane

E-mail: lerato@usaf.ac.za

13.4. Payments

- 13.4.1. Payment shall be made on rendering of professional satisfactory service and submission of the required invoice.
- 13.4.2. Payment shall be made into the service provider's bank account after the receipt of an acceptable invoice. (Banking details MUST be submitted for payment to be effected).
- 13.4.3. Based on the project deliverables, USAf reserves the right to effect payment according to phases completed satisfactorily.
- 13.4.4. The service provider shall be responsible for his/her own arrangements about income tax or any other tax obligations, such as may be applicable. The appointed service provider hereby indemnifies the Contracting Authority against any liability that the Contracting Authority may incur as a result of any obligation on the Contracting Authority to pay over any tax on behalf of the service provider as a result of the provisions contained in the agreement to be signed with the appointed service provider. For purposes of the Agreement to be signed with the appointed service provider, the term "tax" will include SITE, PAYE and any other form of tax, including interest and penalties. The Contracting Authority will, where applicable, deduct 25% of all fees paid to the service provider and remit them to the South African Revenue Service.

13.5 Non-Compliance with Delivery Terms

As soon as it becomes known to USAf that the service provider will not be able to render services within the expected period and/or against the quoted price and/or as specified, USAf must be given immediate written notice to this effect. In instances of non-compliance with certain sections of the contract by the service provider, USAf reserves the right to terminate the agreement.

13.6 Pricing

All prices must be in South African Rand value and must be inclusive of VAT. Fees will be payable in South African Rands on satisfactory completion of the assignment.

13.7 BEE Shareholding

The company's BEE certification, is mandatory.

13.8 Registrations

Proof of company registration must be submitted in the form of copies of the relevant registration documents. e.g. CC/CK, Pty (Ltd). It is the service provider's responsibility to ensure that their CIPC annual returns are in order and that the registration remains valid throughout the contract tenure.

13.9 Tax Pin Certificate

An original and valid tax pin certificate issued by the South African. Revenue Service certifying that the taxes of the service provider are in order must be submitted before the closing date and time. It is the service provider's responsibility to ensure that their SARS annual returns are in order and that the registration remains valid throughout the contract. Failure to do so will invalidate the proposal.

Reviewed and approved by

Name: Dr Edwell Gumbo

Position: Director: Entrepreneurship

Signature:



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Date: 19 October 2026

END