



***“Technical Assistance for the SA-EU Dialogue Facility”***  
(EuropeAid/137708/DH/SER/ZA)

**Terms of Reference 1  
No 58**

**Senior Non-Key Experts  
to  
support EU-SA Dialogue:  
Development of Career Assessment Guidelines**

**DESKTOP STUDY (SOUTH AFRICA AND EUROPEAN UNION)**

Version 3  
22 JULY 2020



The project is funded by the European Union and implemented by Consortium led by Human Dynamics

## SPECIFIC TERMS OF REFERENCE

### Desktop Research of the Non-Psychometric Career Assessment Guidelines in European Union Member States and South Africa

#### 1. BACKGROUND

The cooperation agreement between South Africa (SA) and the European Union (EU) established through the **Trade, Development, and Cooperation Agreement (TDCA)**, signed in 1999 and the **Strategic Partnership**, signed in 2007. The TDCA Agreement provides the main legal basis and framework for SA-EU cooperation in the political, economic, social and cultural fields. The Strategic Partnership focuses on enhancing policy dialogue between the EU and SA in a wide range of political, economic, social and cultural areas.

The Department of Higher Education and Training (DHET) in partnership with the SA-EU Dialogue Facility is embarking on a dialogue on 'Career Assessment Guidelines' with EU member states. This dialogue project will provide an opportunity for mutual learning between SA and EU member states.

The National Development Plan (NDP) 2030 emphasises the need to build faster and more inclusive economic growth. The NDP stresses that a labour market that is more responsive to economic opportunities requires lifelong learning and career advancement. Career services, therefore, play a strategic role in achieving the priorities of the NPD and in fulfilling the interests of the cooperation between SA and the EU.

South Africa gazetted the '*National Policy for an Integrated Career Development System for South Africa*' on 20 April 2017 (No.40795 Vol.622). The policy guides implementation of career development services in all spheres of government. The vision of career development services in South Africa is to provide quality and credible career information to all citizens throughout the lifespan of an individual. The policy further states that special efforts need to be made to integrate Career Development Services career information with self-assessment tools, career planning tools, and job search tools.

The lack of access to quality career services by poor citizens is directly linked to the problem of inequality in SA. Low income earners and the unemployed population in SA cannot afford the cost of psychometric assessments. Several non-psychometric assessments are available to the public however, in the absence of guidelines and standards, the credibility of these assessments cannot be established. The Health Professions Council of South Africa (HPCSA) is responsible for regulating the practice. In the absence of guidelines and standards for non-psychometric assessments, the risk of compromising the practice are high. Absence of guidelines and standards also complicate the ability of the HPCSA to validate existing and new non-psychometric assessments.

A number of EU member states provide career services as a part of lifelong learning including psychometric assessments and non-psychometric assessments (self-exploratory tools). The dialogue project will allow DHET, HPCSA and SACDA to draw lessons from the EU member states and develop non-psychometric assessment guidelines relevant for the SA context.

## 2. DESCRIPTION OF THE ASSIGNMENT

### 2.1 Global objective

The SA-EU Dialogue Facility seeks the services of two Senior Consultants (Non-Key Experts - NKE) to conduct a desktop study on non-psychometric career assessment guidelines in the EU member states and SA respectively.

The SA report will determine gaps and enablers for non-psychometric career assessments and present opportunities identified for effective application of non-psychometric career assessments. The EU desktop report will provide the scope and best practice indicators that SA will scrutinise and adapt for developing the non-psychometric career assessment guidelines in SA.

The two assignments will be conducted simultaneously and shall be used as the baseline for the development of the non-psychometric career assessment guidelines.

### 2.2 Specific Objectives

The specific objectives of this assignment are:

- a. To determine EU member states with existing guidelines and standards for non-psychometric assessments;
- b. To investigate the legislative framework for managing psychometric and non-psychometric assessments in each member state;
- c. To investigate the status of provision of psychometric and non-psychometric career assessments in South Africa; and
- d. To develop and present the respective desktop reports.

### 2.3 Requested Services

Two NKEs will be required for the Desktop Study for SA and EU respectively. The assignment will have 3 phases:

#### a. **Phase One – Desktop research and documented gap analysis report**

Each NKE will develop and present the proposed approach to the study with clear focus areas to be approved by the DHET. Upon approval, the NKEs will conduct desktop research.

The **SA research** will present the status of career assessments practice and the support environment. This study will build on the '*Environmental Scan of Career Advice Services in South Africa*', 2018.

The **EU research** will study the best practice in developing, applying and managing non-psychometric career assessments guidelines. The consultant will identify 5 countries based

Both studies will analyse gaps in career assessment guidelines.

#### b. **Phase Two – Desktop study report writing**

The NKE will develop a report on the desktop research findings. The DHET and the SA-EU Dialogue Facility will review the report and discuss it with the NKE.

### c. Phase Three– Consultative multi-stakeholder workshop in Pretoria, South Africa

The DHET will organise the consultative workshop where the SA and the EU NKEs will present the research finding and lead evidence on key focus areas and gaps to be addressed in developing the guidelines. The DHET will be responsible for compiling the workshop report.

#### 2.4 EU state selection criteria

The EU NKE should consider:

- a. A maximum of 5 countries;
- b. Countries implementing online non-psychometric/psychometric assessments;
- c. Countries with policy/guidelines/standards on development and management of online psychometric and non-psychometric assessments;
- d. A mixture of countries that have been implementing online psychometric and non-assessment for 1-5 years, and 5 years and more.
- e. Countries that have a statutory professional body separate from the government entity/agency/ that implements the online assessments will be preferred;
- f. Countries that have assessed or can report on efficacy and uptake of the online assessments;
- g. Countries that represent both the former Eastern Bloc and Western Europe.

While the DHET has taken interest in some countries such as Hungary, Luxembourg, Ireland and Estonia, the consultant should not be limited in searching for countries that may add more value to the study than these countries.

#### 2.5 Specific questions to be answered by the end of the assignment

- a. What are the socio-economic conditions with implications on the effective application of the guidelines?
- b. What are the issues to be considered for the adaptation of European career assessments guidelines to the South African context?
- c. Is there any legislative environment supporting the implementation and management of the guidelines?
- d. Who are the key role-players in the countries and what specific input will they provide to the study and development of the guidelines?
- e. Does the country have statutory and non-statutory professional bodies and what role do the bodies play in the development and management of career assessment guidelines?
- f. Does the country have both psychometric and non-psychometric career assessments, if so what is the target market for the assessments and who conducts the assessments?
- g. Is there evidence of clear boundaries between the psychometric and non-psychometric career assessment guidelines?
- h. What career assessment practice is applied by the public and civil society sectors?
- i. What practice factors influence harmony for effective co-existence and implementation of both psychometric and non-psychometric career assessments?
- j. What are the key factors to be considered when differentiating psychometric from non-psychometric career assessments?
- k. Does the country use both online and manual assessments?

- l. What interventions are in place for creating awareness of the legislation, guidelines and standards to stakeholders?
- m. What processes need to be followed in developing the non-psychometric assessments?
- n. Is there evidence of non-compliance with existing non-psychometric tools? If so what are the trends to be considered in developing guidelines and standards?
- o. How should quality assurance be managed?
- p. How should compliance be managed?
- q. How should the career assessment user experience be measured?
- r. What are the review mechanism for the guidelines?

## 2.5 Required Outputs

The following outputs are required:

- a. A maximum 5-8 page inception reporting outlining the consultant's comprehension of the assignment, how the consultant intends undertaking the research, justification of the consultant's skills set for the work and project time-frames;
- b. A detailed desktop study report (maximum 30 pages not including annexes) responding to the key questions and including:
  - An executive summary;
  - A table listing key stakeholders and relevant input in developing the career assessment guidelines;
  - Recommendations for developing the career assessment guidelines;
  - Recommendations for designing the virtual study tour;
  - Annexures consisting of samples of psychometric and non-psychometric career assessment guidelines; standard operating procedures; and relevant research outputs on the subject;
  - Reference list for the research including key institutions and contact people; and
  - Presentation for the Technical Working Group Workshop.

## 3. EXPERTS' PROFILE

### 3.1 Duration

The assignment should be performed using a maximum of 15 working days for each NKE including days for attending and presenting at the workshop.

### 3.2 Required expertise per expert

#### Senior Consultant 1 (Non-Key SA Expert):

- a. Minimum Master's Degree in Psychology/Industrial Psychology/Research Psychology;
- b. Registration with the HPCSA as a Psychologist or a Psychometrist;
- c. Proven experience of a minimum 10 years professional research in the field of psychology or psychometry; and
- d. Demonstrated practical experience of managing the development of both psychometric and non-psychometric career assessments.

### Senior Consultant 2 (Non-Key EU Expert):

- Minimum Master's Degree in Psychology/Industrial Psychology/Research Psychology;
- Proven experience of a minimum 10 years professional research in the field of psychology or psychometry;
- Demonstrated practical experience of managing the development of both psychometric and non-psychometric career assessments; and
- Research experience in the EU countries.

It is required that all NKE demonstrate very good understanding of ethics, accountability, integrity and other international standards and best practices regarding regulation of public sector institutions.

## 4. LOCATION AND DURATION

### 4.1 Starting period and indicative time schedule

The indicative commencement date for the assignment is anticipated to 1 September 2020 (contracting period will be August 2020).

#### *Indicative time schedule:*

Indicative timeline	Number of working days	Responsibility	Activity	Location
	Senior Consultant (NKE)			
16 days per consultant	14 days	NKE (SA & EU)	<ul style="list-style-type: none"> <li>Desktop Review Gap Analysis (PHASE I)</li> </ul>	Home based
		NKE (SA & EU)	<ul style="list-style-type: none"> <li>Submit the draft report for SA-EU review and approval</li> </ul>	SA-EU Dialogue and DHET COVID virtual meetings arrangements
	1 day workshop	NKE (SA & EU)	<ul style="list-style-type: none"> <li>Attend and present the report (PHASE II)</li> </ul>	Virtual arrangement
<b>TOTAL</b>	<b>15 days per consultant</b>			

There can be variation in the time schedule as well as shifting of number of working days between the different activities, based on prior approval of the contracting authority. The days are inclusive of the inception report and consultations meetings with the DHET and the SA-EU Dialogue Facility.

#### 4.2 **Foreseen finishing period or duration**

This contract is envisaged to finish no later than 30 November 2020

#### 4.3 **Location(s) of assignment**

The Consultants will be home based and special arrangement for the virtual workshops and consultation will be confirmed by the SA-EU Dialogue Team Leader.

### 5. **REPORTING**

The **indicative time schedule** for the delivery of and comment on the outputs indicated in Section 2.4 is as follows:

REPORT		DELIVERY	DATE FOR COMMENT
Inception report	Draft	Email and virtual consultation	14 September 2020
	Final		20 September 2020
Desktop Study Report	Draft	Email and virtual consultation	15 October 2020
	Final	Email	25 October 2020
Workshop presentation	Draft	Email	30 October 2020
	Final	Email and virtual session	30 October 2020

Language should be English throughout.

All reports should be made available electronically and should be prepared at each submission stage.

### 6. **ADMINISTRATIVE INFORMATION**

The Consultant-NKEs will work under the supervision of the SA-EU Project Management Unit Team Leader.

The PMU Team Leader's details are:

Name: Ms Vuyelwa Masangwana

Designation: PMU Team Leader

Email: [Vuyelwa.Masangwana@dialoguefacility.org](mailto:Vuyelwa.Masangwana@dialoguefacility.org)

Address: 223 Bronkhorst St, Nieuw Muckleneuk, Pretoria

The following indicators will be used to monitor the progress made by the expert under the contract:

- Timely submission of requested reports;
- Responsiveness to inputs and comments made, either through providing additional justifications on the analysis and the logic, or through adoption of comments as presented; and
- The descriptiveness of the reports requested.