

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

**Terms of Reference 2  
No. 58  
Senior Non-Key Experts  
to  
support EU-SA Dialogue:  
Development of Non-psychometric Career Assessment  
Guidelines in South Africa**

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 a Senior Consultant (Non-Key Expert - NKE) as the technical expert to develop Non-psychometric Career Assessment Guidelines in South Africa.

The DHET will provide the NKE with the Desktop Study Report as a base for designing the study tour and developing the guidelines. The Desktop Study will precede this assignment and the contracting process will be managed independently.

### 2.2 Specific Objectives

The specific objectives of this assignment are to:

- a. Design a framework for the virtual study tour on Non-psychometric Career Assessments Guidelines in the EU member states;
- b. Provide expert leadership and guidance during the virtual study tour;
- c. Support drafting of the programme for the TWG workshop on developing the guidelines and the conference;
- d. Participate in the 2 workshops (desktop study debriefing and the development of guidelines) and the conference and specifically direct the input of the TWG in developing the standards;
- e. Develop the Non-psychometric Career Assessment Guidelines in South Africa for approval by the Health Professional Council South Africa (HPCSA); and
- f. Develop the Standards Operating Procedures (SOPs) for managing the guidelines.

### 2.3 Requested Services

The assignment will have 5 phases:

#### a. **Phase One – Virtual Study Tour Design**

The NKE will use the DHET approved desktop study reports as the baseline for designing the virtual study tour. The DHET will establish a Technical Working Group (TWG) of 10 to 15 members. The DHET will organise a workshop with the TWG to debrief findings on the desktop study reports (SA and EU) and give input to the virtual study tour design.

***Deliverable 1: Report on the design and stakeholders to be included in the virtual study tour.***

#### b. **Phase Two – Virtual Study Tour**

The NKE will provide technical leadership in planning and conducting the virtual study tour.

***Deliverable 2: Virtual Study Tour report approved by the DHET***

#### c. **Phase Three – Workshop to Develop the Career Assessment Guidelines**

The NKE will develop a programme to facilitate developing career assessment guidelines with the TWG. The workshop focus points and presentations will be prepared in advance. The DHET will organise the workshop.

***Deliverable 3: Draft 1 Career Assessment Guidelines approved by DHET for further consultation***

***Deliverable 4: Draft SOPs***

**d. Phase Four – Conference on the Career Assessments Guidelines Dialogue**

The conference will serve as the broad stakeholder consultation platform to award member of the Health Professions Council of South Africa (HPCSA), South African Career Development Association (SACDA), higher education institutions and other stakeholders. It will also create awareness of the career assessments guidelines dialogue.

**Deliverable 5: Final guidelines approved by the DHET**

**Deliverable 6: Final SOPs**

*Note: the DHET will develop the conference report*

**e. Phase Five – Project Close Out Report**

The DHET will develop a comprehensive project close out report. The NKE will be required to provide input on deliverables related to the NKE.

**Deliverable 7: Written input for the close-out report**

## **2.5 Required Outputs**

The NKE will be required to produce the following reports and documents:

- a. Inception report outlining the comprehension of the assignment, proposed approach and timeframes (5-8 pages);
- b. Detailed Virtual Study Tour Report (maximum 30 pages not including annexes) responding to the study design and sessions with stakeholders:
  - An executive summary;
  - List of Stakeholders involved and key focus areas per stakeholder;
  - Key findings from the study
  - Recommendation/considerations for developing Non-Psychometric Career Assessment Guidelines in South Africa;
  - Annexures including but not limited to sample guidelines and supporting documents; presentation for the TWG workshop; workshop handout (pre-reading materials); and workshop programme.
- c. Outline of the Non-Psychometric Career Assessment Guidelines in South Africa;
- d. Draft 1 of the Non-psychometric Career Assessment Guidelines in South Africa;
- e. Conference presentation;
- f. Final draft of the Non-psychometric Career Assessment Guidelines in South Africa;
- g. Final SOPs; and
- h. Close out report on the NKE deliverables.

### 3. EXPERTS' PROFILE

#### 3.1 Duration

The assignment should be performed using a maximum of 16 working days including days for attending and presenting at the workshop.

#### 3.2 Required expertise per expert

##### **Senior Consultant (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. A minimum of National Qualification Framework (NQF) Level 6 in Project Management will be an added advantage;
- d. Proven experience of a minimum 10 years professional research in the field of psychology or psychometry;
- e. Demonstrated practical experience of developing both psychometric and non-psychometric career assessments;
- f. Experience in using various statistical packages;
- g. Demonstrated experience in project management;
- h. Experience in developing frameworks, guidelines and standards for a professional sector;
- i. Demonstrated management experience and team leadership skills;
- j. Strong report writing ability; and
- k. Access to reliable internet.

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 be 1 September 2020.

##### ***Indicative time schedule:***

Indicative timeline	Number of working days	Responsibility	Activity	Location
	Senior Consultant (NKE)			
	1 day	NKE	<ul style="list-style-type: none"> <li>▪ Design a guide/framework for the virtual study tour</li> </ul>	Home based
	Min of 5 days (the total days will depend on the	NKE	<ul style="list-style-type: none"> <li>▪ Participate in the virtual study tour</li> <li>Develop the design</li> </ul>	Home based and SA-EU Dialogue Facility arrangements for

	desktop study findings)		for the virtual study tour	virtual workshops
	9 days	NKE	<ul style="list-style-type: none"> <li>Develop guidelines and the Standard Operating Procedures, including participation in the 2 workshops, conference and consultation/briefing sessions with the Project Team</li> </ul>	Home based and SA-EU Dialogue Facility arrangements for virtual workshops and consultation sessions
	1 day	NKE	<ul style="list-style-type: none"> <li>Develop the close out report</li> </ul>	Home based
<b>TOTAL</b>	<b>16 days</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 total number of days are inclusive of the inception report and the consultation 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 31 July 2021.

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

The NKE 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	20 November 2020
	Final	Email and virtual consultation	25 November 2020
Virtual study tour design	Draft	Email and virtual consultation	15 January 2021
	Final	Email	5 October 2020
Summary Report on the virtual Study Tour and an outline for developing the career assessment guidelines	Draft	Email	2 November 2020
	Final	Email and virtual session	28 February 2021
Draft Career Assessment Guidelines – Version 1 (for the Technical Working Group Workshop discussion) and Draft SOP	Draft	Email	22 March 2021
Draft Career Assessment Guidelines and the SOP- Version 2 with input from the Technical Working Group	Draft	Email	16 April 2021
Version 3 guidelines – post conference input for submission to the HPCSA	Final	Email	30 May 2021
Project Close out report input	Final	Email	15 June 2021

Language should be English throughout.

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

## 6. ADMINISTRATIVE INFORMATION

The 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)

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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.