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**Request for Quotations (RFQ)
Terms of Reference (ToR)**

**Appointment of a Service Provider for the Review and Design of
Community-Led Monitoring Data Collection Tools**

Global Fund Grant Cycle 7: 1 October 2025 – 31 March 2028

Closing date: 12th of December 2025, 16h00: SAST

BID REFERENCE: CCI_GF_0112_01

Note:

- Only email applications will be considered. All applicants must follow the instructions laid out below and submit applications to RFA@ccisa.org.za before the closing date and time indicated above.
- Any relevant queries and or questions to be submitted to TOEnquiries@ccisa.org.za not later than the 09th of December 2025 (14h00), and answers to frequently asked questions will be posted on the CCI website www.ccisa.org.za
- **All applications and or enquiries must contain the BID REFERENCE in the subject line.**
- Any changes to this RFA and any related documents or information will be published on the CCI website. Please check the CCI website regularly.

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INTRODUCTION AND BACKGROUND

The South African Global Fund Country Coordinating Mechanism (GF CCM) is responsible for overseeing the implementation of Human Immunodeficiency Virus (HIV) and Tuberculosis (TB) programmes funded by the Global Fund to fight Acquired Immune Deficiency Syndrome (AIDS), TB, and Malaria in the country. The GF CCM has selected the Centre for Community Impact (CCI) as one of the Principal Recipients (PRs) for the grant cycle from 1 October 2025 to 31 March 2028.

Centre for Community Impact is leading the implementation of National Community Led Monitoring (CLM) across all Global Fund supported districts. Community-Led Monitoring is a critical accountability mechanism that empowers communities and beneficiaries of health services to systematically collect data on their experiences accessing HIV and TB services. Robust CLM data has previously informed district-level quality and service improvements, such as extended clinic hours and differentiated care models for key populations.

Centre for Community Impact invites qualified service providers with proven experience in the design and review of data collection tools to apply for the development and enhancement of Community-Led Monitoring (CLM) data collection tools. This process will apply a human rights-based approach to ensure the tools promote dignity, equity, informed consent, and non-discrimination, while strengthening community-led accountability in HIV and TB service delivery. This consultancy will support the implementation of HIV and TB programmes by ensuring that CLM tools are contextually appropriate, user-friendly, and aligned with Global Fund indicators and the National Strategic Plan (NSP) on HIV, TB, and STIs (2023–2028). The appointed service provider will lead a consultative process to assess existing tools, identify gaps, and co-develop standardized, high-quality data collection tools that strengthen data accuracy, community ownership, and evidence-based advocacy.

NB: Applicants are required to submit detailed implementation plans and budgets as part of this call for applications.

PROGRAMME OVERVIEW

Community-Led Monitoring (CLM) is an accountability mechanism for HIV, STIs and TB responses at different levels, led and implemented by local community-led organizations of people living with HIV and TB, key populations (KP), other affected groups or other community entities. The envisaged impact of the CLM programme is to have **Improved access to available, acceptable, quality (AAQ) and equitable non-discriminatory HIV, TB, and STIs services by all affected communities**. Community-Led Monitoring provides real-time, community-generated evidence on service delivery challenges and successes. The quality, relevance, and usability of the data collection tools are fundamental to the integrity and impact of the CLM system. These tools reflect the lived experiences of community and key populations, whose proximity to service users provides invaluable insights into systemic gaps.

The purpose of this consultancy is to conduct a comprehensive review and assessment of the existing CLM data collection tools namely, facility manager survey, observation survey, key population survey and community survey (previously called patient survey). The aim is to enhance their effectiveness, ensure they are context-appropriate for key and priority populations, and align with Global Fund reporting requirements and the goals of the National Strategic Plan (NSP) on HIV, TB, and STIs (2023-2028).

OBJECTIVES OF THE REVIEW / ASSESSMENT

The objectives of the review and co-design of the data collection tools are to:

- To improve the accuracy, consistency, and completeness of CLM data by identifying and addressing gaps, and misalignments in existing data collection tools.
- To ensure that all CLM tools are user-friendly, contextually appropriate, and designed through an intersectional lens to capture relevant, high-quality data that reflects the lived experiences and service access challenges of diverse communities.
- To align CLM data collection tools with AAAQ framework as well as the strategic objectives of the NSP (2023–2028) (Re-engineer CLM Tools to operationalize the AAAQ Framework).
- Future proof CLM tools by ensuring that they are adaptable to digital platforms and aligned with evolving Differentiated HIV/TB service delivery models
- To align data collection tools with CLM reporting requirements (both domestically and globally)
- To ensure that the data collection tools collect data that can be compared with other similar interventions

SCOPE OF WORK

To review, assess and design improved data collection tools that are aligned with the AAAQ framework and strategic objectives of the NSP (2023 – 2028).

CONSULTANCY EXPECTED DELIVERABLES AND DURATION

The assignment shall be completed within [10 non-consecutive days, between December 2025 and January 2026. The successful consultant will be responsible for the following tasks:

FOCUS AREA	KEY ACTIVITY	DELIVERABLES	DURATION
1. Inception and Workplan	• Develop a detailed inception report and workplan. • Attend inception meeting with CCI team and SANAC.	Project inception plan: detailing the overall approach, methodology, workplan, detailed budget, key population network engagement plan and project schedule.	2 days
2. Comprehensive Review	• Conduct a full inventory of existing CLM tools. • Develop a questionnaire guide for networks / sectors engagement. • Facilitate a virtual engagement with the key priority population networks / sectors	Draft assessment report detailing findings from the review and consultations, including gap analysis.	4 days
3. Tool Refinement & Development	• Present draft findings to CCI and key stakeholders. • Revise and refine the data collection tools based on feedback. • Develop new tool components as identified.	A complete suite of revised, human rights approaches, intersectional standardized, and pilot-ready CLM data collection tools (digital and print).	3 days
4. Practical Guide	• Develop a practical guide for using the revised and improved tools.	Practical user guides for CLM data collection tools.	1 day

REPORTING AND SUPERVISION

The consultant will report to the CCI Community Systems Strengthening Technical Lead and the Monitoring and Evaluation Technical Lead working closely with SANAC TSU and Global Fund CLM+ Technical Assistance to ensure ongoing coordination and validation throughout the process.

REQUIRED QUALIFICATIONS AND EXPERIENCE

The consultant should have the following minimum qualifications and experience:

- A Degree in Public Health, Monitoring and Evaluation, Social Sciences, Statistics, or a related field.
- A minimum of 5 years of proven experience in designing, reviewing, and assessing project data collection tools and systems, preferably in the public health or development sector.
- Demonstrated expertise and practical experience in Community Systems Strengthening, Community-Based Research, or Participatory Evaluation Methodologies.
- In-depth knowledge of the South African HIV and TB landscape, with a strong understanding of the issues facing key and priority populations.
- Familiarity with Global Fund M&E frameworks and reporting requirements is a distinct advantage.
- Recently undertaken a similar technical assignment(s) would be an added advantage.

PROPOSAL SUBMISSION REQUIREMENTS

Interested applicants are invited to submit a proposal consisting of all administrative requirements (**see Annexures required**), including the following:

- Technical proposal (max 3 pages) outlining the applicant's understanding of the assignment, approach, and methodology. Include a work plan and timeline detailing key activities and deliverables.
- Financial proposal including daily rate and total cost (in ZAR). The technical expert is expected to submit a detailed quotation that includes a daily rate, any travel, communication (including data), etc.

INSTITUTIONAL AND LOGISTICAL ARRANGEMENTS FOR THE CONSULTANCY

- i. CCI will cover printing costs for data collection tools and digitizing them.
- ii. CCI will provide all existing CLM data collection tools and relevant programme documents.
- iii. CCI will facilitate introductions and coordinate networks/sectors consultations as required.
- iv. The consultant is expected to provide their own work tools (laptop, cell phone, airtime /data, and other basic work tools related to the activity).
- v. Consultants are responsible for their own travel arrangements and data costs (to be included in quotation).
- vi. Payment will be made per agreed milestones after submission and approval of deliverables and according to the agreed payment schedules.

IMPORTANT: This project /assignment will be considered successfully completed after submission and approval of final products /deliverables/milestones. Some deliverables require final approval /sign-off by multiple key stakeholders. If several revisions are required to produce acceptable quality, the costs of these revisions are to be borne by the service provider/ consultant, until the acceptable quality is approved and CCI will not adjust the approved budget in any form.

EVALUATION PROCESS AND CRITERIA

The evaluation of submissions will be managed by CCI and the evaluation process will be conducted according to the following stages:

THE FIRST STAGE:

- This stage assesses compliance with **Administrative Requirements**.
- All applicants **MUST** submit all the mandatory documents below and all **LABELLED** as indicated in Table 1 below.
- Applicants who fail to submit the administrative requirements will not be evaluated further.

THE SECOND STAGE:

- This stage of the evaluation process assesses **Technical Evaluation**, focusing on the ability to fulfil the requirements based on the expected deliverables.
- Proposal quality, experience, and methodology. Supporting documents will be scored. The technical evaluation breakdown is outlined below.

THE THIRD STAGE:

- This final stage will evaluate the cost-effectiveness and value for money aspects of all proposals. Professional fees should be within the available budget for the activity. Proposals will be scored, considering effectiveness and efficiency, and the highest technical quality.

NOTE: CCI is not obligated to prioritise costing over technical integrity of the applicant, and as such will not automatically select the lowest application.

THE FIRST STAGE: ADMINISTRATIVE REQUIREMENTS

TABLE 1: ADMINISTRATIVE DOCUMENTATION

ANNEXTURE	DESCRIPTION
Annexure 1 *	Motivation / Cover Letter (include reference number and full contact details, dated and signed by the Lead Consultant).
Annexure 2 *	Declaration of Interest - A declaration confirming the absence of any Conflict of Interest (COI); or alternatively a declaration stating any existing relationship with CCI employees or Directors. (Refer to COI Form to be completed).
Annexure 3 *	Signed Global Fund Code of Conduct for Suppliers of Services
Annexure 4 *	Proof of CIPC Legal Entity – (If applying as a company otherwise N/A if applying as an individual)
Annexure 5 *	Valid SARS Tax clearance Certificate - (If applying as a company otherwise N/A if applying as an individual)
Annexure 6 *	VAT Registration Certificate - (If applying as a company otherwise N/A if applying as an individual)
Annexure 7 *	Valid B-BBEE certificate/Sworn Affidavit - (If applying as a company otherwise N/A if applying as an individual)
Annexure 8	Organisational Profile stipulating relevant experience (2 pages) (If applying as an individual, Curriculum Vitae of the applicant showing their qualifications and relevant experience) NB: If there are any additional team members, all CVs should be submitted. (include 2–3 contactable references)
Annexure 9	Technical Proposal (Outlining methodology and approach as guided by the scope of work, 3-pages.)
Annexure 10	Implementation plan with realistic deliverables and timelines (1 page).

ANNEXTURE	DESCRIPTION
Annexure 11	Detailed cost proposal (Professional fees including daily rates, any travel, communication, etc).
Annexure 12	List of current and completed assignments on similar work (past 3 years).

Please note:

- Documents marked with asterisk* are **MANDATORY as applicable for a company or an individual, and Annexures 4-7 will not be applicable if applying as an individual.**
- Documents are valid only if obtained /certified within 3 months of the closing date.

THE SECOND STAGE: TECHNICAL EVALUATION SCORING MATRIX

CRITERIA	DESCRIPTION	SCORE WEIGHTING
Motivation / Cover Letter	Motivation letter with full contact details, dated, and signed (10 points).	10
Technical Proposal	Maximum points awarded as below: - Detailed proposal and description of the review, assessment and design approach and methodology in the proposal. (20 points). - Demonstrate clear understanding and sound qualifications, competency and experience (10 points).	30
Technical Expert	Curriculum Vitae (CV) of the Technical Expert The CV demonstrates the human resource capacity to deliver the required, guidance, reporting and training as required. Experience is demonstrated and applicable to the required need. (20 points)	20
Past and or present Project list	- Evidence of relevant experience within the past 3 years in the relevant field. (5 points) - Three (3) Reference Letters on similar work (within the last 3 years) submitted. (5 points)	10
Project reporting experience	Maximum of two (2) examples of recent similar work completed (in the past 3 years). (10 points)	10
Implementation Plan	Implementation plan is detailed and demonstrates a clear understanding of the scope of work with realistic deliverables and applicable timelines. (10 points)	10
Cost effectiveness	Review of any value-add or value for money benefit as per of technical and/or costing proposal. (10 points)	10
TOTAL		100
TOTAL TECHNICAL EVALUATION TO BE AVERAGED OUT OF 80%		

THE THIRD STAGE: PRICE EVALUATION

Bidder who has successfully met all the administrative and technical evaluation on stage 1 and stage 2 will be further evaluated in stage 3 (Price).

PRICE	Score (Out of 20%)
Within 10% out of range of the budget (over or under) = 20 points	20%
Within 11 - 20% out of range of the budget (over or under) = 10 points	10%
Within 21% out of range of the budget (over or under) = 5 points	5%

For applicants who satisfy the administrative and technical requirements, the weighting of the overall score is as follows:

SCORING MATRIX	
Technical Evaluation Score	80%
Price	20%
TOTAL	100%

APPLICATION INSTRUCTIONS

All applicants are required to note that:

- Only email-submitted applications will be considered.
- Mark their applications with **“Application – REVIEW & DESIGN OF CLM TOOLS – Name of Provider – BID Reference Number”** in the email subject line.
- Should the application submission be too big for one email, applicants must submit batches as detailed below until all batches are submitted:
 - **“Batch 1 - Application – REVIEW & DESIGN OF CLM TOOLS – Name of Provider – BID Reference Number”**
 - **“Batch 2 - Application - REVIEW & DESIGN OF CLM TOOLS – Name of Provider – BID Reference Number”**

KEY DATES

The deadline for the submission of a fully completed application, including all relevant attachments, is the 12th of December 2025 (16h00: SAST). The key dates for the application process are shown in the table below.

STAGE	DATE / PERIOD
1. Publication of the Request for Applications	3 December 2025
2. Deadline for questions and request for information. Such must be directed to TORenquiries@ccisa.org.za	09 December 2025 (14h00: SAST)
3. Deadline for submitting applications. No late applications will be accepted.	12 December 2025 (16h00: SAST)
4. Evaluation period (indicative) during which additional details may be requested.	15-16 December 2025
5. Appointment of Service provider (Indicative)	17 December 2025
6. Submission of the final report	23 January 2026