



TERMS OF REFERENCE

TITLE: Consultancy for the Study On The Elements And Economic Costs Of Disability For Children With Disabilities And Persons With Physical Disabilities In South Africa

LOCATION: Home-based, South Africa

TYPE OF CONTRACT: Company

LANGUAGES REQUIRED: English

STARTING DATE: Estimated to start May 2021 – End December 2021

DURATION OF INITIAL CONTRACT: Approximately 130 working days

1. BACKGROUND

Background

UNDP is committed to promoting human rights through a diverse range of programming activities, knowledge products, advocacy campaigns and capacity development tools. UNDP works in about 170 countries and territories, helping to eradicate poverty, reduce inequalities and exclusion, and build resilience so countries can sustain progress. As the UN's development agency, UNDP plays a critical role in helping countries achieve the Sustainable Development Goals.

In South Africa, as elsewhere in the world, people with disabilities constitute one of the most excluded groups in society and face serious barriers to the full enjoyment of their human rights. Whilst Persons with Disabilities account for 7.5% of the population, most Persons with Disabilities continue to face consistent social and economic exclusion, discrimination and inequalities in South Africa. Altogether, the key barriers are a combination of social, cultural, attitudinal and physical obstacles, which persons with disabilities encounter in their daily lives. The barriers presented to persons with disabilities

exacerbate already existing vulnerabilities based on poverty, gender stereotypes and stigma associated with various kinds of illnesses, including STIs such as HIV/AIDS.

The UN Country Team in South Africa, in partnership with the Department of Women, Youth and Persons with Disabilities (DWYPD), successfully applied for Multi-Party Fund from the United Nations Partnership to promote the Rights of Persons with Disabilities in South Africa for a period of 12 months, January to December 2021. A collaborative and working partnership between UNDP, OHCHR, UNICEF and DWYPD has been established to implement the expected deliverables and outcomes of the project.

In year 2013 to 2015 this partnership has successfully implemented phase 1 outcomes which included the following:

- a) Strengthen M&E capacity for effective oversight and advocacy for promotion of rights of persons with disabilities;
- b) Establish a CRPD compliant legal and policy framework to implement provisions of the Convention in South Africa; and
- c) Reduce economic vulnerability of persons with disabilities

One of the main objectives of the UN Partnership to Promote the Rights of Persons with Disabilities-South Africa Project was to conduct a study on reducing economic vulnerability for persons with disabilities. A pilot study was conducted that resulted in the Report on The Elements of the Financial and Economic Costs of Disability to Households in South Africa (Part 1). This was accepted as the first part of the study because the research did not reach saturation points for two participating groups, namely; children with disabilities and persons with physical disabilities

The focus on Phase 2 will be on strengthening of co-ordination and institutional frameworks at national, provincial, and local level, including the private sector. The focus areas and proposal for the UNPRPD Phase 2 are:

- a) Outcome 1: Economic vulnerability of persons with disabilities reduced through disability responsive budgeting (Cost of Disability Research Study, Part 2)
- b) Outcome 2: Improved well-being of children with disabilities through regular and systematic tracking (UNICEF)
- c) Outcome 3: Increased capacity of persons with disabilities and the South African Human Rights Commission to monitor implementation of the Convention on the Rights of Persons with Disabilities in South Africa

In accordance with outcome 1 of phase 2, potential consultants are invited to submit proposal to conduct the research study on Economic vulnerability of persons with disabilities reduced through disability responsive budgeting (Cost of Disability Research Study, Part 2).

A number of interventions have been instituted by government and other stakeholders to address the many challenges faced by persons with disabilities. These are often inadequate to improve the lives of persons with disabilities, including children with disabilities, as the actual cost and quantity of the reasonable accommodation measures needed by persons with disabilities has not been exhaustively estimated or measured.

The study will provide evidence for, among others, the determination of social security benefits, subsidisation of, among others, special schools and other services targeting persons with disabilities, as well as reasonable accommodation support. In that regard, the study will provide distinct costing of reasonable accommodation measures support intended to remove barriers to participation for persons with disabilities, including children with disabilities, and a model thereof.

2. DUTIES AND RESPONSIBILITIES

The consultant will report directly to a person designated by the Department of Women, Youth and Persons with Disabilities, as well as to a focal point in the UNDP, South Africa. The consultant will conduct the research, information gathering and in-depth analysis on Economic vulnerability of persons with disabilities reduced through disability responsive budgeting (Cost of Disability Research Study, Part 2)

2.1. Objectives

a) The aims of the assignment are to reach saturation levels in participatory research on children with disabilities and persons with physical disabilities in order to complement The Elements of the Financial and Economic Costs of Disability to Households in South Africa (Part 1).

2.2. Scope of work:

In order to achieve the above objectives, the following are the specific tasks that summarise the scope of the assignment:

a) Range and cost of services - In-depth analysis of the range of disability specific services that government need to provide for children with disabilities and persons with physical disabilities, as well as the reasonable accommodation costs to make mainstream programmes accessible.

b) Disability-related costs to households - an in-depth analysis of the disability-related private costs children with disabilities / persons with physical disabilities and their families incur to enable them to play, learn and work. This will include the modelling of costs of accessing services, including the additional cost of reasonable accommodation such as assistive devices, personal assistance,

interpreter services, loss of income, transport services etc. What are the costs incurred by children with disabilities / persons with physical disabilities and their families that are different to their counterparts in accessing services and community life? What is the current extent of tax rebates claimed for disability-related costs?

c) Economic / Opportunity cost - In addition, a comparative analysis will be undertaken on the opportunity cost of foregoing access to socio-economic rights to the individual, family, community and country due to the tangible cost to both action and inaction on the part of the State/duty bearer. The inability to access a basket of services can result in loss of income, inability to live independently, a greater burden on the family in terms of decreasing the household income or income potential due to care-giver duties taken on by family members.

d) Comparative analysis of budget allocations and estimated costs incurred by children with disabilities / persons with physical disabilities - A comprehensive analysis and comparison of the current budgeted expenditure on services for including children with disabilities / persons with physical disabilities, across all three spheres of government by the duty-bearer and the estimated costs incurred by right holders to access these services. It will be useful to establish the gap between the costs incurred by the rights holder in relation to the budget allocation by the duty bearer in enabling access to basic services. In this section, researchers will also be expected to investigate the discrepancy between the current level of social grants accessed by children with disabilities / persons with disabilities, and the optimum level of grants that should be provided to enable them to meet their basic need and thus lead decent and productive lives.

e) Scoping international benchmarking – An exploratory desktop study scoping international benchmarking on the financial and economic costs of disability with a view to identifying workable solutions as to how the gap between actual costs and budgeted expenditure should be addressed.

The Report will as such analyse and reflect the costs of providing a continuum of services to children with disabilities / persons with physical disabilities, from a rights-holder's perspective as well as from a duty-bearer's perspective, with a view to highlighting the coherence or incoherence in the supply and demand of services, best practices, international benchmarking, benchmarking with similar models and/or approaches focusing on gender and child-responsive budgeting. It will also reflect the costs that South Africa will have to bear if it does not provide for the needs of persons with disability i.e. Cost of not doing something. Modelling productivity lost, income foregone, plus actual, financial costs of care, treatment & rehab of those with impairments etc.

f) The research should highlight the following services: education, health and other, social services with particular emphasis on:

- Availability;
- Accessibility;
- Affordability;
- Adequacy;
- Quality;

- Safety.
- g) Develop in consultation with senior managers within DWYPD programmes, an analysis report of costing imperatives for mainstreaming disability according to a CRPD- compliance disability model. This will be based on the study conducted on The Elements of the Financial and Economic Costs of Disability to Households in South Africa.
- h) The appointed consultant will facilitate a stakeholder workshops in partnership with the DWYPD and stakeholders to validate the research findings.

3. DELIVERABLES AND ESTIMATED TIMEFRAME

Activities and deliverable	Timeframe	Payment
<ul style="list-style-type: none"> A research work plan and activity implementation plan containing: <ul style="list-style-type: none"> -research methodology and literature review -policy analysis and a brief overview within the context of the study inception report on how the research will be conducted. 	By end of May 2021	30%
<ul style="list-style-type: none"> Draft report at validation workshop for final inputs. Submit the final edited consolidated report to DWYPD. This should be an easy-to-read document for target audience. 	By 16 September 2021	30%
<ul style="list-style-type: none"> An analysis research report of costing imperatives for mainstreaming disability according to a CRPD- compliance disability model. This will be based on the entire study conducted on The Elements of the Financial and Economic Costs of Disability to Households in South Africa, Part 2. 	By End Of November 2021	30%
Final report	By 10 th December 2021	10%

Each deliverable as stated above is required to be delivered to UNDP designated Team Leader and DWYPD designated senior manager in satisfactory quality and in a timely manner. Each deliverable and change in the methodology, research objective has to be discussed and accepted by UNDP designated Team Leader and DWYPD designated senior manager.

4. SAMPLE POPULATION AND TARGET AREAS

- a) The project scope must reach the following target areas in line with the initial study:
 - Gauteng Province (Urban areas)
 - Kwa-Zulu Natal Province (Rural areas)
 - Western Cape Province (Rural areas)
- b) The target population will be 240 children with disabilities at special schools and 90 persons with physical disabilities all located in the identified Provinces.

5. METHODOLOGY

The following methodologies are suggested for conducting the study:

a) Quantitative Analysis

- **Secondary data analysis** of national household survey datasets (in particular GHS 2012 and Census 2011) to derive the number of children with disabilities and persons with physical disabilities, by type and severity of disability, age and gender. The social and economic status of households with children with disabilities / person with physical disabilities will be disaggregated by income quintile to analyse the links between disability, poverty and access to social services across socioeconomic strata.
- **Disability Responsive Illustrative Cost Models** for the delivery of services catering to common impairments in order to estimate the aggregate costs of services needed by persons with physical disabilities and children with disabilities.

b) Qualitative Analysis

- **Literature review** of existing research on the financial and economic costs of disability in South Africa and beyond; reports to the UN Committee on the Rights of the Child and the Committee's concluding observations and recommendations; sectoral reviews undertaken by Government and partners; the National Research Study to identify social needs concerning people with disabilities etc.
- **One-on-one interviews** with officials in government departments responsible for policies, planning, allocating resources and managing programmes directed at people with disabilities.
- **Questionnaires** that can be sent out to national, provincial and local disability organisations as well as individuals with disabilities through the DSD network
- **Focus-group discussions** with representatives of disability groups in different geographical setups.
- **Participatory workshop** with organisations delivering services to children, women and men with disabilities to gain insights into the costs they incur when providing their support.

6. COPYRIGHT

All information and products produced by contractor under this project will remain property of the UNDP and DWYPD.

7. SPECIAL CONDITIONS

- a) The appointed consultant will be required to sign a service level agreement / contract.
- b) Payment will be made in proportion to the work completed and upon acceptance by the UNDP & DWYPD in accordance with the contract and work completed.
- c) The UNDP & DWYPD will conduct quality assurance on work done by the contractor and unsatisfactory work will be referred to the consultant for improvement before payment is affected.
- d) The consultant must at all times comply with UNDP & the Departments' policies and procedures as well as maintain a high level of confidentiality of information.
- e) All information, documents, programmes and reports must be regarded as confidential and may not be made available to any unauthorised person or institution without the written consent of the designated officials from UNDP & DWYPD.

8. MONITORING AND REPORTING REQUIREMENTS

The Contractor will work under the supervision of UNDP designated Team Leader and DWYPD designated senior manager and in close coordination with the focal points at UNDP Country Offices and relevant units.

The Contractor shall comply with the system of monitoring, evaluation and quality control, implemented by the UNDP. All necessary performance information, reports, statistics, electronic and paper version of the reports should be prepared and submitted for clearance by UNDP within the agreed period of time.

The Contractor has to consult with UNDP on all the steps of the process and proceed to next step only upon obtaining an approval on the accomplished step. The Contractor should arrange its activities based on the principle of constructive co-operation. It is mandatory to take into account all proposals of UNDP.

After the completion of all deliverables, the Contractor is to submit to the UNDP the detailed report, containing a brief description of the work performed and the key deliverables.

All reports and results are to be submitted to the UNDP in electronic form (*.docx, *.xlsx, *.pptx, and *.pdf, SPSS output files or other formats accepted by UNDP).

9. MANAGEMENT ARRANGEMENTS

The Contractor will work under the supervision of UNDP Team Leader and in close coordination with the focal points at UNDP Country Offices and relevant IRH units.

All the products developed by the contractor during the assignment should ensure the reference to the UNDP copyrights and all content, logos any other intellectual property will be solely owned by UNDP.

The implementation of services will be monitored in accordance with the working plan, but UNDP reserves the right to request information about the current state of progress at any stage. The final decision on the evaluation of the work delivered by the Contractor will be made by the UNDP Team Leader.

10. COMPETENCIES

Ethics & Values:

- Demonstrates / Safeguards Ethics and Integrity;
- Displays cultural, disability, gender, religion, race, nationality and age sensitivity;
- Demonstrates and promotes the highest standard of integrity, impartiality, fairness and incorruptibility in all matters affecting his/her work and status.

Communicating Information and Ideas:

- Delivers verbal/written information in a timely, clear, organized and easily understood manner;
- Excellent oral and written skills to develop knowledge products in specified areas.

Self-Management & Emotional Intelligence:

- Creating synergies through self-control tolerates conditions of stress, uncertainty or ambiguity and continues to maintain a positive outlook and to work productively.

Functional Competencies:

- Strong analytical, reporting and writing abilities;
- Strong intercultural skills and communication;
- Familiarity with key networks and disability organizations active in South Africa
- Openness to change and ability to receive/integrate feedback;
- Proven capacity to prioritize tasks, and work under pressure and tight deadlines;
- Self-starter, with ability to work independently.

11. QUALIFICATIONS

a) Education:

Team leader and research team members must have Postgraduate university degree (SA NQF 8 or Equivalent qualifications) in monitoring and evaluation, social research, human rights/disability rights or related field with qualifying experience.

b) Working experience:

- Minimum of five years of professional experience in human rights, monitoring and evaluation and social research.
- Experience in remote human rights research, monitoring and reporting is required.
- Experience in information management, data analysis or equivalent is required.
- Experience in producing infographics is desirable.
- Advance knowledge in report writing and secondary analysis skills.
- Knowledge of the South Africa region is desirable.
- Proven track record of working with the civil society and disability sector organizations

c) Language:

- Excellent writing, editing, and oral communications skills in English (both oral and written) is required.

12. EVALUATION OF APPLICANTS

Applicants will be evaluated based on a technically qualified and least costly taking into consideration the the applicants' qualifications and financial proposals. The award of the contract should be made to the applicant whose offer has been evaluated and determined as:

- a) Responsive/compliant/acceptable, and
- b) Having met the minimum technical requirements and financial criteria specific to the solicitation.

Only candidates who receive min 70% of points in technical evaluation (Criteria A-D) will be considered for the financial evaluation.

Technical Criteria - 70% of total evaluation – 100 max technical points:

Technical Proposal (70%) = 70 points

- Criteria A - At least five years of human rights, monitoring and evaluation and social research; – max. 30 points.
- Criteria B – Proven experience in building partnerships on development issues, particularly disability related issues; – max. 30 points;
- Criteria C– Proven track record of working with the civil society and disability sector organizations. – max. 20 points.
- Criteria D – Experience on human rights policy analysis and development of human rights or social research reports, – max. 20 points;

Financial Criteria - 30% of total evaluation – max. 30 points

- Sample report(s) and/ or links to online content authored/coauthored by the candidate that is relevant to this assignment (sample(s) can be submitted as .pdf together with other attachments
- Financial Proposal that indicates the all-inclusive fixed total contract price and all other travel related costs (such as flight ticket, per diem, etc.), supported by a breakdown of costs, as per template attached to the Letter of Confirmation of Interest template. If an applicant is employed by an organization/company/institution, and he/she expects his/her employer to charge a management fee in the process of releasing him/her to UNDP under Reimbursable Loan Agreement (RLA), the applicant must indicate at this point, and ensure that all such costs are duly incorporated in the financial proposal submitted to UNDP. Annex 2 Letter to UNDP Confirming Interest and Availability.

Companies are responsible for ensuring they have vaccinations/inoculations when travelling to certain countries, as designated by the UN Medical Director.

Consultants are also required to comply with the UN security directives set forth under dss.un.org.

General Terms and conditions as well as other related documents can be found under: <http://on.undp.org/t7fJs>.