

Terms of Reference (ToR)

Monitoring & Evaluation (M&E) Specialist

Background

The KgoLo Community Development Trust (KCDT), formerly known as the Hotazel Manganese Mine Education Trust, is a public benefit Trust committed to improving the quality of life of communities within the John Taolo Gaetsewe (JTG) District of the Northern Cape.

Since its establishment, the Trust has invested significantly in education, while progressively expanding its investment portfolio to include health, infrastructure and broader community development initiatives. As the Trust enters its new strategic cycle for the next five years, it is repositioning itself from a traditional grant maker to a strategic investor, placing greater emphasis on evidence-based decision making, measurable impact, institutional learning and sustainable development outcomes.

Central to this strategic shift is the establishment of a robust Monitoring, Evaluation and Learning (MEL) system that enables the Trust to understand not only what it funds, but how its investments contribute to meaningful and lasting change within beneficiary communities.

Accordingly, the Trust seeks to appoint a suitably qualified and experienced Monitoring, Evaluation and Learning (MEL) Specialist to develop an integrated Theory of Change and MEL Framework that will guide programme planning, implementation, reporting, learning and strategic decision-making across the Trust.

Purpose of the Assignment

The purpose of this assignment is to develop a practical, evidence-based and scalable Monitoring, Evaluation and Learning (MEL) Framework, underpinned by a clear Theory of Change, that will enable the Trust to:

- articulate its contribution to sustainable development within the JTG District;
- measure the effectiveness, efficiency and impact of its investments;
- strengthen organisational learning and adaptive management;
- improve accountability to beneficiaries, Trustees and stakeholders; and
- support strategic planning, resource allocation and investment decision-making.



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Objectives

The successful consultant will be required to:

- Develop a Theory of Change that clearly articulates the Trust's long-term vision, development pathway and intended impact.
- Develop a comprehensive Monitoring, Evaluation and Learning Framework aligned to the Trust's Strategic Plan.
- Establish measurable indicators across outputs, outcomes and long-term impact.
- Design practical systems for data collection, reporting, verification and performance monitoring.
- Strengthen the Trust's organisational capacity for evidence-based decision-making.
- Embed learning and adaptive management practices into the Trust's governance and programme management processes.

Scope of Work

The successful consultant will be required to undertake the following:

A. Theory of Change Development

- Facilitate a participatory Theory of Change development process involving Trustees, Management, implementing partners and other key stakeholders;
- Articulate the causal pathways for change, linking inputs, activities, outputs, outcomes, and long-term impact;
- Identify and validate the assumptions, risks and external factors underpinning the Theory of Change;
- Align the ToC with the Trust's Strategic Plan and investment philosophy; Ensure alignment with relevant national and provincial development priorities, including the Northern Cape Department of Education's Vision 2034 and other applicable policy frameworks.

B. Monitoring, Evaluation and Learning Framework

The consultant shall develop a comprehensive MEL Framework which includes:

Results Framework

Develop a Results Framework that clearly defines:

- Inputs
- Activities
- Outputs
- Outcomes
- Long-term Impact



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Indicator Framework

Develop an indicator matrix including:

- indicator definitions
- calculation methodology
- baseline requirements
- annual targets
- data sources
- frequency of reporting
- responsible parties
- means of verification

Data Collection System

Develop:

- data collection tools;
- reporting templates;
- beneficiary tracking tools;
- verification templates; and
- data quality assurance procedures.

Data Management

Provide recommendations regarding:

- digital monitoring systems;
- dashboard development;
- data governance;
- data storage;
- data security; and
- information management.

Monitoring and Reporting

Design a practical monitoring system which includes:

- quarterly programme reporting;
- annual programme performance reporting;
- Board reporting templates;



- SIPP Committee reporting templates;
- project scorecards;
- implementation dashboards.

C. Learning and Adaptive Management

Develop mechanisms that enable the Trust to become a learning organisation, including:

- annual learning agenda;
- reflection sessions;
- programme review mechanisms;
- feedback loops;
- knowledge management processes;
- continuous improvement recommendations.

The consultant should also assist the Trust in capturing and synthesising lessons from approximately eighteen years of community investment.

Institutional Capacity

Assess the Trust's current Monitoring and Evaluation maturity and recommend:

- governance arrangements;
- institutional roles and responsibilities;
- capacity development requirements;
- implementation roadmap; and
- sustainability plan.

Consultant Requirements

The successful consultant should demonstrate:

- a minimum of ten (10) years' experience in Monitoring, Evaluation and Learning;
- demonstrated experience in developing Theories of Change;
- experience designing MEL systems for foundations, trusts, public benefit organisations or development programmes;
- strong facilitation and stakeholder engagement skills;



- knowledge of education, community development and philanthropy;
- experience working within the South African development sector.

Proposal Requirements

Interested consultants should submit:

- Technical Proposal outlining methodology and approach;
- Project workplan and timelines;
- Company profile;
- Curriculum Vitae of proposed team members;
- At least three relevant project references;
- Financial proposal;
- Valid Tax Compliance Status PIN;
- Proof of professional registration (where applicable);
- B-BBEE certificate or affidavit.

Evaluation Criteria

Proposals will be evaluated using the following criteria:

CRITERION	WEIGHT
Methodology and understanding of the assignment	30%
Relevant organisational experience	25%
Experience of proposed personnel	20%
Value-add and innovation	10%
Financial proposal	15%

Only consultants achieving the minimum technical threshold may proceed to financial evaluation.



Timeframes

The assignment is expected to commence in **September 2026** and be completed within **8-10 weeks** of appointment. A detailed project schedule will be agreed during the inception phase.

Intellectual Property and Confidentiality

All reports, frameworks, templates, tools, methodologies and other materials developed under this assignment shall become the property of the KgoLO Community Development Trust.

The appointed consultant shall maintain strict confidentiality regarding all information obtained during the course of the assignment and shall not disclose such information without the prior written consent of the Trust.

SUBMISSION DETAILS

Proposals must be submitted electronically to:

Email: info@kgolotrust.org and cc: analyst@kgolotrust.org

Submission deadline: **24 July 2026** at 12:00 pm. Late submissions will not be considered.

General Conditions:

The Trust reserves the right to:

- accept or reject any proposal, in whole or in part;
- request additional information or clarification from bidders
- invite shortlisted consultants to present their proposed methodology
- negotiate the scope of work and fees with the preferred bidder
- discontinue or amend the procurement process at any stage without incurring any liability; and
- appoint the consultant that, in the opinion of the Trust, offers the best overall value, taking into account technical quality, experience and price.