



Terms of Reference

Monitoring and Evaluation Consultant Design of Organisational PMERL System

January 2026

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Patron: Mary Burton **Executive Director:** Rachel Bukasa

- Trust Registration Number: IT 1179/85
- Non-Profit Organisation Registration Number: 006-214
- Public Benefit Organisation Registration No: 930005962
- BBBEE (Socio-economic development beneficiary certificate)

Table of Contents

1	Background.....	3
2	Purpose of the Assignment.....	3
3	Scope of Work.....	3
3.1	Finalise strategic indicators.....	3
3.2	Design an organisation-wide M&E system	4
3.3	Review and integrate existing tools	4
3.4	Develop data collection tools and templates	4
3.5	Briefing and handover	4
4	Expected Deliverables	5
5	Duration and Timing	5
6	Budget.....	5
7	Management and Reporting	6
8	Required Qualifications and Experience	6
9	Selection Criteria.....	6
10	Proposal Requirements	6

1 Background

Black Sash is a South African human rights organisation that works at the intersection of social protection and justice. The organisation promotes the realisation of socio-economic rights, with a particular focus on social protection, access to basic services and community-based access to justice.

Black Sash's Strategic Plan 2026 to 2031 sets out five interlinked strategic outcomes and a programmatic focus that includes community-based monitoring, advocacy, education and training, and communications. The plan commits the organisation to strengthening its Planning, Monitoring, Evaluation, Reporting and Learning (PMERL) systems, to ensure that organisational performance and impact are consistently measured, analysed and used to inform learning and decision making.

To date, monitoring and evaluation practices across the organisation have been uneven and project-specific, with limited consolidation at organisational level. Some tools and donor-specific templates exist, but there is no single integrated PMERL framework with clearly defined indicators and standardised reporting formats. The Strategic Plan therefore identifies the development of such a framework, and the strengthening of related systems, as an urgent priority in the first year of the new strategic period.

Black Sash wishes to engage an experienced consultant to support the development of a practical, organisation-wide M&E system that is aligned with the Strategic Plan and that can be implemented and maintained by staff.

2 Purpose of the Assignment

The overall purpose of this contract is to design a practical Monitoring and Evaluation system for Black Sash, including refined outcome-level indicators, a PMERL framework, tools and templates, and a simple dashboard prototype, in order to enable the organisation to monitor and report on its impact over the 2026 to 2031 strategic period.

3 Scope of Work

Working closely with a small internal team, the consultant will undertake the following tasks.

3.1 *Finalise strategic indicators*

1. Review the Strategic Plan 2026 to 2031, including the Theory of Change, strategic outcomes and operational plans.
2. In consultation with the internal Black Sash Task Team for the project, refine each of the five strategic outcome areas so that they are linked to a concise and coherent set of indicators.
3. For each indicator, develop an indicator reference sheet that includes:
 - definition
 - baseline information, where available
 - annual or mid-term targets
 - data source
 - frequency of data collection and reporting
 - responsible person or team
4. Ensure that the indicator set responds to existing donor requirements and is compatible with the commitments made in the Strategic Plan, including alignment with key elements of the Social Protection Floor and community-based monitoring work.

3.2 Design an organisation-wide M&E system

5. Develop a simple but comprehensive PMERL framework for the organisation for 2026 to 2031. This should:
 - link strategic outcomes, outputs and indicators
 - describe roles and responsibilities for data collection, analysis and reporting
 - specify the frequency and format of internal reporting (monthly, quarterly and annual)
 - identify how learning and reflection will be built into organisational practice, including preparation for the 2028 mid-term review and the 2030 final evaluation.
6. Map internal data flows that show how information will move from community level and programme teams to management and the Board.
7. Design a dashboard prototype, using a platform that is compatible with existing tools (for example Excel, Google Sheets, Zoho or Baserow). The dashboard should allow management to track progress against key indicators at a glance.

3.3 Review and integrate existing tools

8. Review current donor-driven templates and internal Excel-based tools that are used to capture programme and organisational data.
9. Identify essential data requirements to be retained and integrated into the new system.
10. Recommend where existing tools can be simplified, consolidated or phased out in order to reduce duplication and reporting burden.

3.4 Develop data collection tools and templates

11. Develop practical templates and tools that can be used by staff, which may include:
 - indicator tracking sheets
 - short survey and interview templates, where relevant
 - quarterly and annual reporting templates
 - a brief standard operating procedure (SOP) or guidance document for data collection, storage and quality assurance.
12. Ensure that all tools are designed with the organisation's existing human and technical capacity in mind, and that they are suitable for use across programmes and regions.
13. Provide a two-hour briefing session (in person or online) to a small internal group, to walk through the PMERL framework, indicators, data flow, tools and dashboard.
14. Amend and improve templates and tools, based on feedback from the session.

3.5 Briefing and handover

15. Present the final version to the PMERL Task Team.
16. Provide written notes or slides so that internal staff can use them as the basis for internal training.

4 Expected Deliverables

The following is a list of likely deliverables. The final set of deliverables will be finalised during the contracting phase of engagement with the successful contractor.

1. A refined set of strategic indicators with indicator reference sheets.
2. A PMERL framework document for 2026 to 2031, including roles, responsibilities, data flows and review points.
3. A short M&E manual or guidance note that explains how the system works and how tools should be used.
4. Data collection and reporting templates (for example tracking sheets, quarterly and annual report formats).
5. A dashboard prototype that can be used in Excel, Google Sheets, Zoho or Baserow.
6. Materials for the internal briefing session, and a brief handover note.
7. A short completion report that summarises the work done and offers any recommendations for further strengthening the system.

All deliverables will be submitted in editable formats.

5 Duration and Timing

The anticipated duration of the assignment is approximately five to six months, commencing in early 2026. However, the precise sequencing, intensity, and pacing of the work is intentionally flexible.

Black Sash envisages that the assignment will involve a more intensive, front-loaded phase at the outset, focused on core design, set-up, and strategic work, followed by lighter-touch, ongoing support for as long as is necessary and useful to the organisation. This later phase may take the form of advisory input, refinement, troubleshooting, or periodic check-ins, depending on the agreed approach.

Consultants are invited to propose an appropriate phasing model that they believe will best meet the objectives of the assignment. Any such proposal must, however, remain within the overall budget set out in these Terms of Reference. Extensions in time do not imply extensions in budget.

- Proposal submission deadline: **30 January 2026**
- Expected appointment: by **6 February 2026**
- Assignment start date: **Mid- to Late-February 2026**

A detailed workplan and timeline will be agreed at inception.

6 Budget

The maximum available budget for this assignment is **R170 000 (one hundred and seventy thousand rand), VAT inclusive**. Proposals that exceed this ceiling will not be considered.

The budget should cover all professional fees and reimbursable costs, including travel, accommodation and communication expenses where applicable. Please budget for at least two x one and a half-day in-person meetings in Cape Town. Out-of-town service providers should factor this in.

7 Management and Reporting

The consultant will work under the overall guidance of the Executive Director. Day-to-day liaison and coordination will be undertaken by the Resource Mobilisation Manager and the CBM and Research Manager.

Key check-ins will include:

- An inception meeting and approval of the detailed workplan
- A mid-assignment review of draft indicators and the emerging framework
- A draft presentation of the full system and tools
- Final handover and briefing session

8 Required Qualifications and Experience

The preferred consultant will have:

- At least five years' experience in Monitoring and Evaluation in the non-profit sector, with a focus on system and framework design.
- Demonstrated experience working with rights-based or social justice organisations.
- Proven ability to design practical, user-friendly M&E tools and dashboards.
- Experience in integrating M&E systems with existing data platforms or simple databases.
- Strong facilitation and communication skills, and the ability to work collaboratively with a small internal team.
- Excellent written English and the ability to produce clear guidance documents.

9 Selection Criteria

Proposals will be assessed using the following criteria:

- Relevant experience and expertise.
- Quality and practicality of the proposed approach and methodology.
- Demonstrated understanding of rights-based and civil society contexts.
- Value for money within the budget ceiling.
- Availability to complete the work within the proposed timeframe.
- Feedback from referees.

10 Proposal Requirements

Interested consultants are invited to submit:

1. A brief proposal of no more than six pages outlining:
 - understanding of the assignment
 - proposed approach and methodology
 - indicative workplan and timeline
2. A detailed budget within the stated ceiling.
3. CVs of the lead consultant and any proposed team members.
4. The email address and telephone number of contacts from two organisations for which similar work has been undertaken, who would be willing to provide a verbal reference.
5. The proposal should be emailed to abigail@blacksash.org.za by **30 January 2026**. (Please note that questions of clarity can be emailed to this address until midday on 22 January 2026). ENDS.