# 

**TERMS OF REFERENCE**



**CONSULTANCY TO HIRE A FIRM FOR UNDERTAKING OF NATIONAL TRAININGS ON CENSUS AND SURVEY PROCESSING SYSTSEM (CSPro) IN TWO (2) SADC MEMBER STATES**

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BACKGROUND INFORMATION

* 1. Partner country

The Southern African Development Community (SADC).

* 1. Contract authority

The Contracting Authority is SADC Secretariat, represented by its Executive Secretary.

* 1. Background

The Southern African Development Community (SADC) is a Regional Economic Community comprising 16 Member States, namely; Angola, Botswana, Comoros, Democratic Republic of Congo, Eswatini, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Tanzania, Zambia, Zimbabwe. Established in 1992, SADC is committed to Regional Integration and poverty eradication within Southern Africa through economic development and ensuring peace and security.

Article 14 of the SADC Treaty establishes the SADC Secretariat as the principal executive institution of SADC. The Secretariat performs its mandate and functions within the policy, strategic and programme provisions outlined in the Regional Indicative Strategic Development Plan (RISDP) and the Vision 2050. The SADC Vision 2050 earmarks Statistics a priority cross-cutting sector whereby by 2050, the region strategic objective in statistics is to realize a robust and responsive regional statistical system to underpin regional integration processes, including measurement of progress and impact.

* 1. Current situation in the sector

Article 6 of the SADC Protocol on Statistics refers explicitly to data sources and collection techniques. Specifically, Member States is recommended to collect household and enterprise-based information for compilation of official statistics in both formal and informal sectors of their economies using a combination of data collection instruments. Within this context, Member States shall implement appropriate survey design methodologies, traditional or modern data collection techniques, sampling procedures and Geospatial Information system, to conduct census including economic census and surveys. In this regard, there is a need to capacitate Member States to effectively design and implement censuses and surveys using modern data collection and processing techniques. The benefits of using modern data collection techniques ensures comprehensive data collection for complex surveys, robust data quality checks, cost effective, simplify survey coordination, and ability to manage large-scale surveys efficiently amongst others.

With the Regional Statistics Project funded by the World Bank, Secretariat is undertaking capacity building and technical assistance on various topics on statistics, including on specialized software for collection, processing, validation and analysis from censuses and surveys.

Within this context, Secretariat is looking to recruit a consultancy firm which may include but not limited to research centres or universities to train SADC Member States on Census and Survey Processing System (CSPro) for beginners and intermediate level.

* 1. Needs assessment

Member States requested training on CSPro to create customized data collection applications with quality control checks, data editing and imputation, and tabulation of census and survey data.

OBJECTIVES, PURPOSE AND EXPECTED RESULTS

* 1. Overall objective

The overall objective of this exercise is to build and enhance capacity of Member States on the use of modern data collection techniques to collect and manage complex surveys/census data efficiently with in-built robust data quality checks.

* 1. Specific objectives (Purpose)

The specific objective of the assignment is to undertake national trainings on CSPro for data collection, editing and tabulation of census and survey data for official statistics, especially:

1. to introduce participants the diverse functionalities of CSPro; and
2. to equip participants with practical skills necessary for effective data collection, management, and analysis using CSPro.
   1. Results to be achieved by the Consultancy Firm

The Consultancy Firm is expected to achieve the following result:

1. Strengthened technical capacity of National Statistics Offices with the skills and knowledge to effectively create customized data collection applications with quality control checks, data editing and imputation, and tabulation of census and survey data using CSPro, ensuring high-quality data collection.

SCOPE OF WORK FOR TRAINING ON CSPRO

* 1. Scope of work

The selected service provider is expected to deliver in-person technical training workshop on CSPro census and survey data processing that includes data collection, editing, tabulation and dissemination. The preparatory work consists of drafting an Inception Report with the programme for the training as well as preparing training materials. The training shall be done during 10 working days with an audience that regroups mainly data producers of official statistics at national level. The training must provide for theoretical and practical sessions on the preparation of data collection forms with in-built robust data quality and validation checks as well as data management using CSPro. It is expected that practical sessions are carried out using specific census/survey requirements of Housing and Population Census questionnaire and household / enterprise surveys questionnaires from the Member States. The training report should contain summary of topics covered during training week, and training materials as annexes.

* 1. Geographical area to be covered

The assignment will be carried out in 2 SADC Member States.

* 1. Target groups

This consultancy is expected to target the National Statistics Office, in particular, statisticians involved in data collection process and management of census and survey data, including new staff with limited or no knowledge on CSPro.

* 1. Specific work

The assignment will be carried out primarily through a national training in two selected Member States of SADC Region.

In particular, the consultant will be required to:

1. Produce an Inception Report demonstrating how the training will be organised and its effectiveness towards impactful results. It should have the objectives and expected outcome of the training, a structured agenda and programme to cater for practical training on CsPro.
2. Develop generic training materials for the **beginners’ level** that cover at least the following topics:
3. Introduction to CSPro:

* Overview of CSPro and its applications; and
* CSPro Interface.

1. Data Collection and Management :

* Importance of data quality in surveys; and
* Role of CSPro in data collection and processing workflows.

1. Data Dictionary:

* Defining variables, value sets, and record structures; and
* Practical exercise: Building a simple data dictionary.

1. Introduction to Data Entry Applications

* Basics of CSPro data entry applications; and
* Designing a simple data entry form.

1. Designing Data Entry Applications :

* Adding controls (text fields, checkboxes, drop-down lists);
* Linking fields to dictionary variables;
* Basic validation techniques (range checks, required fields); and
* Designing conditional navigation (skipping questions based on responses).
* Incorporating multimedia elements (images, audio, video) within questionnaires to enhance respondent engagement
* Incorporating Global Positioning System (GPS) and maps in CAPI application.

1. Develop generic training materials for the **intermediate** **level** that cover at least the following topics:
2. Introduction to CSPro Logic Programming:

* Writing basic logic: If-else statements and loops;
* Implementing Advanced Validation including consistency checks between fields;
* Automating data entry processes with logic; and
* Displaying error messages and warnings

1. Mobile Data Collection and Data Processing:

* Introduction to Mobile Data Collection;
* Using CSPro’s data synchronization tools;
* Batch Processing for data management; and
* Dependent and Independent Verifications.

1. Data Management:

* Creating HTML reports in CAPI application.
* Batch editing
* Data imputation techniques
* Exporting data to CSV, Excel, SPSS, R, Python, STATA or other formats; and
* Preparing datasets for analysis.

1. Managing Surveys

* Planning and organizing large-scale surveys;
* Managing multiple data entry applications.
* Troubleshooting Common Issues
* Handling data inconsistencies.
* Writing scripts to automate workflows.

1. Produce a Training Report of the Member State that should include the following:

* Summary of topics covered during training week;
* Pre- and Post-Training Surveys assessment of participants knowledge and identifying areas of improvement; and
* Training Materials as annexes for use by the Member State.
  1. Reserve for continuation of contract

The assignment is for training in 2 SADC Member States. The Firm shall be subject to evaluation after each training in a Member State. Continuation of contract is upon satisfactory completion and quality of the previous assignment based on positive evaluation from the first training.

* 1. Eligible entities

Eligible entities for the current assignment are consultancy firm which may include but not limited to research centres or universities.

QUALIFICATION AND EXPERIENCE REQUIREMENTS

This assignment is expected to be carried out by experienced Master Trainers from University, Research Centres and Consultancy Firms and there should be evidence of in-depth knowledge with the CSPro and trainings at national level. The specific profile of Experts is provided below:

| **Profiles of Experts** | **Qualifications and Skills** | **General Experience** | **Specific Experience** |
| --- | --- | --- | --- |
| **TWO (2) Expert Trainers** | * A minimum Masters Degree in statistics, economics, IT, Data Science or related field. PhD degree in the above mentioned field shall be an advantage * Written and oral fluency in the English language is essential. * Excellent oral and written communication, analytical, presentation and report writing skills in English Language. * Excellent time management and organizational skills to prioritize workload and deliver needful during the training week. * French and Portuguese fluency shall be highly desired for undertaking training in French and Portuguese speaking countries | The Experts must have at least ten (10) years of experience using and providing trainings on CSPro in Official Statistics, as undertaken by a National Statistics Office (NSO). | * Demonstrated experience in creating and managing electronic questionnaires using CSPro for at least 3 surveys for Official Statistics at national level; * Experience in the design and implementation of training materials for the conduct of training in Official Statistics using CSPro; * Experience as a resource person in delivering at least 5 training on CSPro at national level, particularly using household and census questionnaire. |

The expert must be independent and free from conflicts of interest in the responsibilities they take on.

Note that civil servants and other staff of the public administration, of the partner country or of international/regional organizations based in the country, shall only be approved to work as experts if well justified. The justification should be submitted with the tender and shall include information on the added value the expert will bring as well as proof that the expert is seconded or on personal leave.

REPORTING REQUIREMENTS AND TIME SCHEDULED FOR DELIVERABLES

* 1. Reporting requirements

The consultant shall operate under the oversight of the Senior Officer – Research & Statistics and direct supervision of Officer – Research and Statistics.

All the deliverables shall be delivered to the Officer – Research and Statistics who shall assess and review the deliverables in line with the requirement of the Term of the References; and approved by the Senior Officer- Research and Statistics.

All reports / training materials shall be in electronic format in MS Word, Excel or PowerPoint format as the case may be. CSPro file formats such as the data dictionary file (.dcf) and data entry forms (fmf) amongst others should be shared with SADC Secretariat and participants. The training materials including power point presentations and CSPro file formats will be the property of SADC Secretariat and will be used for additional training if required. The Expert shall work with the Secretariat up to the end of the assignment, shall have delivered the following in electronic format within four (4) months:

|  |  |  |
| --- | --- | --- |
| **Name of report** | **Content** | **Time of submission** |
| Inception report | It should demonstrate how the training will be organised and its effectiveness towards impactful results. It should have the following:   * Objectives and expected outcome of the training; and * Structured agenda and programme to cater for theoretical and practical training on CSPro. | No later than 7 calendar days after the signing of the contract. |
| Training reports | Each report should cover:   * summary of topics covered during training week; * pre and post training assessment; and * Final Training Materials. * Recommendations for implementation by the recipient entity with timelines and targets/outputs | No later than 10 calendar days after the completion of the national training workshop. |

* 1. Submission and approval of report

The reports referred to above must be submitted to the project manager identified in the contract. The reports must be written in English. The project manager is responsible for approving the reports.

* 1. Project management

Overall responsibility for technical supervision of the consultancy will lie with the Officer – Research and Statistics whilst the Senior Officer – Research and Statistics shall provide managerial oversight on the assignment. The Consultant shall be responsible for the operational day-to-day management and coordination of the consultancy work.

* 1. Management structure

The Consultant shall report directly to the Officer – Research and Statistics in execution of the assigned tasks.

LOGISTICS AND START DATE

* 1. Location

The assignment will involve traveling to selected SADC Member States.

* 1. Office accommodation

None required

* 1. Facilities to be provided by the contracting authority

For the expert working on this consultancy, the Contracting Authority shall facilitate for visa entry in SADC Member States, if required.

* 1. Facilities to be provided by the contractor

The contractor must ensure he/she is adequately prepared and equipped for delivery of the training and drafting of deliverables. Moreover, the Firm is expected to be fully self- sufficient in terms of international travel associated expenses, laptop and related device connectivity for projector for this consultancy.

* 1. Equipment

No equipment is to be purchased on behalf of the contracting authority / procuring entity as part of this service contract or transferred to the contracting authority / procuring entity at the end of this contract. Any equipment related to this contract that is to be acquired by the procuring entity must be purchased by means of a separate supply tender procedure.

* 1. Start date and period of implementation

The intended start date is as soon as both parties have signed the contract agreement and the period of implementation of the contract will be 4 months duration post the signing of the contract.

MONITORING AND EVALUATION

* 1. Definition of indicators

The indicators to be used are timeliness, technical coverage and analytical quality of the 2 Reports as detailed in 5 above. In addition, assessment of the effectiveness of the training to be done using pre and post-test surveys with recipients of the capacity building activity.

* 1. Special requirements

The Consultant must declare any potential conflict of interest between the provision of the requested services, and other activities in which, a member of their consortium of group (s), or any expert proposed in their offer is engaged.

ASSUMPTIONS AND RISKS

* 1. Assumptions underlying the project

It assumed that the consultant would be procured within the reasonable timeframe and activities implemented within the schedule provided up to 31st March 2026.

* 1. Risks

The nature of the assignment presents negligible risks associated with the consultancy. Some of the foreseen risks are the following:

| **Possible risks** | **Risk Level** | **Mitigation Measures** |
| --- | --- | --- |
| Unavailability of key stakeholders to provide relevant information due to change in the working environment | Medium | Plan and communicate ahead with key stakeholders; have more than one communication means |

**9. FINANCIAL PROPOSAL**

**9.1 Financial proposal**

The financial proposal should include professional fees, travel cost and any other relevant costs for the conduct of the two trainings, split by each training.

Payments for the assignment shall be related to the reports and their approval as mentioned in 9.2.

**9.2 Schedule of payment**

Payments for the assignment shall be related to the reports and their approval as follows:

**10%** of the contract price shall be paid upon submission and approval of the inception report and training materials.

**45%** of the contract price shall be paid upon submission and approval of the Training Report for the first Member State trained.

**45%** of the contract price shall be paid upon submission and approval of the Training Report for the second Member State trained subject to good evaluation of the first training.