

TERMS OF REFERENCE



CONSULTANCY TO CARRY OUT A NATIONAL TRAINING ON SURVEY SOLUTION TO FIVE (5) SADC MEMBER STATES

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1. BACKGROUND INFORMATION

1.1 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, Swaziland, 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.

1.2 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 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.

Secretariat is prioritizing statistical capacity building as part of its implementation plan guided by the Regional Strategy for Development of Statistics (RSDS) 2020-30. With the Regional Statistics Project funded by the World Bank, capacity building shall basically come in the form of development of practical guidelines in specific domains; rolling out national and regional training programmes and assisting Member States through technical assistance. The scope of the project includes providing 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, a national training on Survey Solution will be delivered to five (5) SADC Member States to effectively design and implement data collection tools on census and surveys. It is within this background that Secretariat is looking for an individual consultant to deliver training on Survey Solution.

2. OBJECTIVES OF THE ASSIGNMENT AND EXPECTED RESULTS

2.1 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.

2.2 Specific objectives

The specific objective of the assignment is to undertake one national training on Survey Solution in each of the five (5) SADC Member States to implement data collection tools for census and survey.

2.3 Expected results

The consultant is expected to achieve the following result:

- i. Strengthened technical capacity of National Statistics Offices in five (5) SADC Member States with the skills and knowledge to effectively design, implement, manage, and analyze census and surveys using Survey Solution, ensuring high-quality data collection.
- ii. Implementation of the training content by the National Statistics Offices in successfully developing the 2030 census questionnaire using survey solutions and in future economic and household surveys.

3. SCOPE OF WORK

3.1 Scope of work

This assignment primarily consists of undertaking and servicing a national training on Survey Solution to implement data collection tools for census and survey as a resource person. The preparatory work consists of drafting an Inception with the programme for the training as well as preparing training materials. The training shall be done during 5 working days in a week with an audience that regroups mainly data producers of census and survey 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 Survey Solution. The training report should contain summary of topics covered during training week, and training materials as annexes.

3.2 Geographical area to be covered

The assignment will be carried out in five (5) SADC Member States.

3.3 Target groups

This consultancy is expected to target the National Statistics Office, in particular, statisticians involved in data collection processes and management of data for the census and survey.

3.4 Specific work

The assignment will be carried out primarily through a national training in each of the five (5) SADC Member States.

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 Survey Solution.
2. Obtain the census and survey questionnaire from National Statistics Office prior to the event and prepare training materials that cover at least the following topics:
 - (i) Survey Solution Fundamentals:
 - Benefits of Computer Assisted Personal Interviewing (CAPI) and Survey Solution as a platform;
 - Overview of the Survey Solutions system, including the Designer, Interviewer, and Server components; and
 - Setting up a Survey Solutions server, creating user accounts, and importing a sample questionnaire.
 - (ii) Questionnaire Design (Survey Solution Designer)
 - Basic Design Principles including question types, branching logic, and data validation rules; and
 - Advanced Design Techniques including features like masking, cascading selections, lookup tables, and macros.
 - (iii) Data Collection (Survey Solution Interviewer)
 - Interviewer application;
 - Synchronization between the tablet and the server;
 - Data Collection Process including how to conduct interviews, handle errors, and mark questionnaires as complete; and
 - Supervisor validation
 - (iv) Survey management (Survey Solution Server)
 - User roles and permissions (admin, supervisor, interviewer);
 - Survey Management including managing surveys, assigning tasks, and monitoring progress;
 - Data quality control to identify and address data quality issues; and
 - Data Back-up and recovery procedures.

- (v) Data Analytics and Reporting
 - Data exports to other software such as CsPro, Excel, STATA, and SPSS;
 - Data Analysis including basic data analysis using Survey Solution or other statistical software; and
 - Report generation from the data collected.
 - (vi) Troubleshooting and Support
 - Troubleshoot common problems encountered during the survey process; and
 - Access to Survey Solutions documentation and support channels.
3. 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 each Member State trained and sharing to participants.

4. QUALIFICATION AND EXPERIENCE REQUIREMENTS

This assignment is expected to be carried out by an individual consultant as the Master Trainer and there should be evidence of in-depth knowledge with Survey Solution. The specific profile is provided below:

Qualifications and Skills

- A minimum of a Degree in statistics, economics, IT or related field, A Master's degree and above 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.

General Professional Experience

- The Expert Must have at least ten (10) years of experience using Survey Solution in Official Statistics, as undertaken by a National Statistics Office (NSO).

Specific Professional Experience

- Demonstrated experience in creating and managing electronic questionnaires using Survey Solution for at least 3 surveys for Official Statistics at national level;
- Experience in the design and implementation of training materials for the conduct of statistical data analysis training in Official Statistics using Survey Solution;

- Experience as a resource person in delivering at least 5 training activities on Survey Solution at national/regional/international stages, particularly using household and census data.

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.

5. REPORTING REQUIREMENTS AND TIME SCHEDULED FOR DELIVERABLES

5.1 Reporting requirements

The consultant shall operate under the guidance of the Senior Officer – Research & Statistics and direct supervision of Officer – Research and Statistics responsible for data collection techniques.

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 as the case may be. The training materials including power point presentations and Survey Solution forms/syntax developed during the training will be the property of SADC Secretariat. The Expert shall work with the Secretariat up to the end of the assignment, shall have delivered the following in electronic format within 12 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 practical training on Survey Solution.	No later than 7 calendar days after the signing of the contract.
Training reports	For each Member State, the report should cover: - summary of topics covered during training week; and - Training Materials as annexes for use	No later than 7 calendar days after the completion of each of the national training workshops for each Member State.

5.2 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.

5.3 Project management

Overall responsibility for supervision of the Consultancy will lie with the Officer – Research and Statistics. The Consultant shall be responsible for the operational day-to-day management and coordination of the consultancy work.

5.4 Management structure

The Consultant shall report to the Officer – Research and Statistics and perform the assigned tasks.

6. LOGISTICS AND START DATE

6.1 Location

The assignment will involve traveling to five (5) SADC Member States.

6.2 Office accommodation

None required

6.3 Facilities to be provided by the contracting authority

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

6.4 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 Consultant is expected to be fully self-sufficient in terms of international travel associated expenses in the five (5) SADC Member States, laptop and related device connectivity for projector for this consultancy.

6.5 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.

6.6 Start date and period of implementation

The intended start date is as soon as both parties have signed the contract agreement and the the contract implementation period will be 12 months, commencing on the date the second party signs the agreement.

7. MONITORING AND EVALUATION

7.1 Definition of indicators

The indicators to be used are timeliness, technical coverage and analytical quality of the 2 Reports as detailed in 5 above.

7.2 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 or group (s), or any expert proposed in their offer is engaged.

8. ASSUMPTIONS AND RISKS

8.1 Assumptions underlying the project

It is assumed that the consultant would be procured within the reasonable timeframe and activities implemented within the schedule provided of 12 months.

8.2 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
1. 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 all consultancy fees and any other costs associated with undertaking the assignment in each of the five Member States .

9.2 Schedule of payment

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

20% of the contract price shall be paid upon submission and approval of the Inception Report

16% of the contract price shall be paid upon submission and approval of the first Training Report

16% of the contract price shall be paid upon submission and approval of the second Training Report

16% of the contract price shall be paid upon submission and approval of the third Training Report

16% of the contract price shall be paid upon submission and approval of the forth Training Report

16% of the contract price shall be paid upon submission and approval of the fifth Training Report



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Document Name:	Terms of ReferenceTOR_Survey Solution.pdf	Document Size:	370.1 KB
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Web Evidence

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