

# REQUEST FOR PROPOSALS

<b>Number:</b>	<b>RFP-2021-004</b>
<b>Project:</b>	<b>Baseline and Follow-up Data Collection for the USAID/Vietnam Disabilities Project</b>
<b>Phase:</b>	Baseline and follow-up
<b>Funder:</b>	Social Impact/USAID
<b>RFP Release Date:</b>	April 2, 2021
<b>Deadline for Questions:</b>	3:00 PM Hanoi time, April 7, 2021
<b>Answers to Questions:</b>	April 9, 2021
<b>Deadline for Proposals:</b>	3:00 PM Hanoi time, April 15, 2021
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## I. Project Background

### About Social Impact and Learns

Social Impact is a global development management consulting firm. We provide monitoring, evaluation, strategic planning, and capacity building services to advance development effectiveness. We work across all development sectors including democracy and governance, health and education, the environment, and economic growth. Since 1997 we have worked in over 100 countries for clients such as US government agencies, bilateral donors, multilateral development banks, foundations, and nonprofits.

SI is implementing the USAID/Vietnam Learns contract. The scope of the five-year project is to support USAID/Vietnam staff and its implementing partners to implement more efficient, effective, and sustainable programs by (1) improving staff’s knowledge and skills in Monitoring, Evaluation & Learning (MEL) and Collaborating, Learning & Adapting (CLA); (2) advancing evidence-informed decision-making; (3) strengthening strategic collaboration between staff and local stakeholders.

Under this contract, SI is requesting data collection services from Vietnamese firms for a study regarding quality of life (QOL) for persons with disabilities (PWDs) in Vietnam.

### Project Background

USAID/Vietnam has been assisting PWDs in Vietnam since 1989. Beginning in 2015, USAID started a new Disabilities Project focusing on improving service provision, rehabilitation systems,



and policy support to expand opportunities for PWD. This project, originally intended to expire in 2019, has since been modified and extended through 2024.

USAID/Vietnam has called for a performance evaluation of its overall Disabilities Project to understand how QOL and access to rehabilitation and social services will change for targeted PWD beneficiaries during this new phase. This study will be used primarily by USAID, its implementing partners (IPs), and its host government partners to inform their understanding of the current and changing landscape of PWD QOL and services available to them. This effort will help them improve the quality and effectiveness of this project.

The evaluation would examine the beneficiaries and intervention areas of each of the implementing partners (IPs) administering USAID's longer-established activities:

- PHAD (Hold My Hand)
- IC (Moving Without Limits)
- VNAH (Disability Rights Enforcement, Coordination, and Therapies)
- VietHealth (Disabilities Integration Services and Therapies Network for Capacity and Treatment)
- HI (Advancing Medical Care and Rehabilitation Education)
- DRD (Access For All)
- ACDC (Raising Voices, Creating Opportunities)

These activities provide services such as rehabilitation, home-based care, assistive devices, social services, advocacy and disability rights support, and support networks to people with a wide range of types of disabilities, from moderate to severe. Some activities also focus on broader disability policy and adherence. The evaluation is not meant to evaluate specific activities listed above but rather to understand what is happening across USAID's portfolio and learn from it.

## II. Scope of Work

The overall objective of this Request for Proposals is to collect data on PWD QOL, services available to them, and factors affecting the success of USAID interventions in the sector. Specifically, the study is to help Learns answer the following Evaluation Questions (EQ):

1. To what extent has the quality of life for persons with disabilities receiving USAID-supported assistance changed over time?
2. What are the factors affecting the success of the three intervention areas targeted for USAID support (rehabilitation, social services, and disability policies)?
3. To what extent have the availability, accessibility, and quality of rehabilitation and social services in USAID-targeted provinces changed over time?

These questions are designed to measure each step along with the project's theory of change: "If persons with (severe) disabilities receive rehabilitation and social services within an improved disability context, then their quality of life will be improved."

The selected Subcontractor will prepare a technical proposal that addresses all aspects of the data collection as detailed in each section below.

### Data Collection Activities

All data collection will be constrained to **three provinces: Binh Dinh, Dong Nai, and Quang Tri**. Though not expected, it is possible these may be subject to change. This subcontract will consist of the following data collection activities:

#### Survey with persons with disabilities:

**Description:** The survey assesses quality of life according to standard WHO tools: the WHODAS 2.0<sup>1</sup> (36-question module) as well as ten selected questions about subjective well-being from another WHO tool. It also captures history of rehabilitation and social services received along with satisfaction, awareness and participation in disability rights activities and benefits. SI has developed the baseline instrument in English and Vietnamese, including slightly modified modules for a survey administered a) directly to an adult with disability, b) to the PWD's caregiver, should the PWD be unable to communicate clearly, c) to the caregiver of a child with disability. In addition, SI will create a follow-up instrument that contains slight modifications.

**Rolling baseline:** In order to capture pre-treatment QOL, we intend to do baseline interviews with PWDs soon after they have been screened and targeted by IPs or local providers to receive new benefits. If it is not possible to interview them before treatment begins, the Subcontractor may interview them up to one month after start of treatment, provided the PWD will continue to receive treatment into the future. USAID Disabilities Project implementing partners (IPs) recruit new beneficiaries on a rolling basis, sometimes with just a few new people targeted to receive new

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<sup>1</sup> Manual available here:

[https://apps.who.int/iris/bitstream/handle/10665/43974/9789241547598\\_eng.pdf?sequence=1](https://apps.who.int/iris/bitstream/handle/10665/43974/9789241547598_eng.pdf?sequence=1)

services every month. This makes it challenging to capture a sufficient sample size at a single point in time, even when compiling beneficiaries across multiple IPs. IPs have provided SI with an anticipated number of new beneficiaries each month in each targeted province. This includes beneficiaries slated to be served directly by the IP with rehabilitation, home-based care, assistive devices, help groups, or other interventions (direct beneficiaries) as well as those slated to receive new services from the local providers, such as a local health facility, that the IP supports (indirect beneficiaries). Building in assumptions about participation rates, SI used this information to estimate it may take two to three months to attain the sample of 344 PWDs. We have set a target of 3 months maximum duration such that we will need the Subcontractor to closely monitor baseline progress and participation rates to assess whether additional measures should be taken mid-course to improve progress.

**Follow-up survey:** Our intent is to capture QOL data approximately six months from the start of treatment. Given the rolling nature of baseline recruitment into our cohort, we expect follow-up data collection will follow the same pattern. This means the Subcontractor will maintain a follow-up interview schedule according to the known date they began to receive services. The Subcontractor would telephone the PWDs or their caretakers to schedule a follow-up interview within a somewhat flexible time window.<sup>2</sup>

**Respondent identification and outreach at baseline:** SI will provide IPs and the local providers with a New Beneficiary Contact Information Form. They will be asked to document all new beneficiaries and submit them to the Subcontractor as soon as they are targeted for services, or at least on a biweekly schedule. We expect to have a substantial list of beneficiaries to interview at the start of data collection, with additional beneficiaries' names rolling in over the next two-three months. The IP or service provider will obtain PWD permission prior to sharing their information with the evaluation team. The Subcontractor personnel would then make phone calls to every beneficiary on the list to schedule a home visit for the survey.

We anticipate that many providers will not remember to send lists regularly. As such, we ask that bidders articulate a clear plan for how they will proactively solicit new beneficiary lists from IPs and various local service providers (often hospital staff or smaller health facilities) at the provincial or local level at least biweekly to ensure all new beneficiaries are included for outreach. This might require in-person visits to providers to gather contact information. We expect the Subcontractor to enlist data collectors who reside in the targeted provinces, to enable continuous data collection as well as proactive queries with IPs and providers to obtain lists on a biweekly basis. If this is not feasible, the bidder must provide a detailed explanation of how they intend to administer an alternative plan that will not cause delays or excessive costs.

**Sample size:** 344 persons with disability must be interviewed at baseline and again six months later. However, this number includes a 50% sample buffer to account for those who do not consent

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<sup>2</sup> If this plan seems impossible or excessively burdensome or costly to administer, we welcome bidders to describe their concerns as well as what it would take to administer this plan as we've stated. If necessary, we are open to administering the follow-up survey at a single point in time (meaning the follow-up timeframe will vary across the cohort, depending on when they were interviewed at baseline).

to participate and attrition at follow-up. This is the number required to measure a 10% or more change in QOL score over time. Note we will be doing a census of all new beneficiaries recruited during the rolling baseline period, up until we attain the needed 344 individuals. It will not be a random sample selection. This will not be spread evenly across the three provinces. Dong Nai may have a larger percentage of the cohort whereas Quang Tri may be fewest. SI will provide cohort allocation estimates prior to contract finalization.

**Data collection medium:** The survey must be based on an electronic tablet/phone platform. SI's preference is SurveyCTO; however, we can be open to alternative platforms, if the bidder shows strong competence at programming within that platform. If done in SurveyCTO, SI is prepared to program the electronic survey and provide support to the firm's survey administrator in how to use it. If done in another platform, the firm would be responsible for programming the survey, in a manner transparent and accessible to SI staff, to enable quality oversight. Bidders must specify whether it will provide tablets for this effort, and if so, which platforms they operate on (e.g. Android, Mac). If the firm does not own tablets, please budget for rentals.

**Piloting:** Though the WHO tool components of the PWD survey have been translated and used in Vietnam before, robust piloting is still essential to ensure it is acceptable, understandable, and of feasible length for the targeted population.

**Other preparation:** SI will translate the instrument into Vietnamese, but the Subcontractor will be asked to support verification of translation and to complete back-translation to English. SI will manage obtaining ethical approval for the PWD survey as well as other methods from a local public health school as well as from SI's Institutional Review Board (IRB). The Subcontractor will be expected to advise on IRB-related issues and keep SI informed of adverse events.

**Table 1. Summary of Data Collection Activities**

Activity	Respondents	Sample Size	Location within Binh Dinh, Dong Nai, and Quang Tri	Duration
<b>Surveys</b>	PWDs or their caregivers as proxies.  Includes small portion of interviews with children with disabilities age 5-17, with their caregiver serving as primary respondent.	344 at baseline, intake on rolling basis over period of up to 3 months;  Repeat at follow-up, 6 months after interview with same cohort. Also done over time.  50 for pre-baseline pilot	Respondent's home	1.5 hours/survey

<b>Key informant interviews (KIIs)</b>	Rehabilitation service providers	6 (2 per province) at baseline and 1-year follow-up	Provider office	1 hour/ interview
	Home-based care service providers	6 (2 per province) at baseline and 1-year follow-up	Provider office or home	
	Disabled People's Organizations (DPOs)	3 (1 per province) at baseline and 1-year follow-up	DPO office	
	Persons with disabilities <sup>3</sup>	15 (5 per province) at baseline and 1-year follow-up	Respondent's home or local community location	
<b>Site visit observations + quantitative data extraction from records, reports</b>	Rehabilitation service providers	30 (10 per province) at baseline and 1-year follow-up  2 for pre-baseline pilot	Provider office	1 hour/ visit
	Home-based care service providers	30 (10 per province) at baseline and 1-year follow-up  2 for pre-baseline pilot	Provider office or home	
	DOH/DOLISA	6 (2 per province) at baseline and 1-year follow-up	Respondent's office	

### Key Informant Interviews:

**Description:** KIIs will provide qualitative opinions and experiences of key stakeholders primarily regarding topics in EQ2 and EQ3. SI will administer its own KIIs with a separate set of stakeholders (primarily IPs and government agencies at the national and provincial level). The Subcontractor is responsible for interviews with other stakeholders at the provincial level, including service providers at the local level. SI will provide a structured interview guide with key

<sup>3</sup> These may be held as small group interviews, where feasible according to respondent comfort, proximity to each other, and COVID risk. Consider the same number of interviews regardless of whether it is with one or 2-3 persons in each.

topics to cover, including challenges in delivering adequate services to PWDs, approaches that have worked well, rehabilitation service delivery practices, and other topics. KIIs with PWDs will focus on understanding how they define and experience QOL, issues affecting their satisfaction with rehabilitation and social services, and their understanding of disability rights. If possible to target 2-3 PWDs living in proximity, and if acceptable based on COVID precautions, it is preferred that at least some of the interviews be conducted in a small group setting.

**Respondent identification:** SI will provide the Subcontractor a list of proposed respondents. Rehabilitation services providers will include at least one health facility providing rehabilitation services and one rehabilitation department within the facility.

**Timeframe:** In contrast to the PWD survey, KII data collection will occur at one point in time, over a period of about 3 weeks. The Subcontractor would complete interviews with a similar set of respondents one year later, using slightly modified question guides.

**Data collection medium:** Each interview should be led by an experienced qualitative interviewer, accompanied by a note taker. With permission of the respondent, interviews should be audio recorded to facilitate verbatim transcription.

**Translation:** The Subcontractor will be expected to translate the KII guides into Vietnamese and any other local languages that might be required to communicate effectively with the targeted respondents.

**Piloting:** Piloting will not be done for KIIs.

### Site Visits:

**Description:** Site visits will occur at rehabilitation centers and other health facilities to document the quality and availability of services. This will entail working with a key staff member to quantify staffing and respective training, using a data form. This might require assembling information available on scattered forms in the office or through talking with staff. Site visits will enable enumerators to review patient records, with permission, to validate information collected through other means. For example, patient files may demonstrate utilization of treatment goals and outcome measures linked to rehabilitation service provision and home-based care interventions. This will be according to a data recording form and training provided by SI.

Given the technical nature of the site visit assessment, bidders are strongly encouraged to identify mid-level data collectors with educational or professional experience in rehabilitation (such as students or recent graduates at physical therapy programs). However, SI is prepared to provide training to data collectors.

**Respondent identification:** SI will provide the Subcontractor a list of proposed respondents.

**Timeframe:** As with KIIs, this will be done within a 3-week data collection period at baseline and again one year later.

**Piloting:** The Subcontractor must pilot the site observation protocol in 4 facilities, with support and oversight from SI. This will be a hands-on extension of the training. The pilot should be

focused on not only training the data collectors but also working out modifications to the process or tools that will better facilitate the process.

### Preparations for Data Collection

Subcontractors will be required to undertake a number of activities in preparation for data collection. This will include:

- **Comment on data collection protocols:** Subcontractor will review and provide feedback on SI's data collection protocols, to ensure that they are properly contextualized, and to ensure that SI has properly considered likely eventualities.
- **Develop manuals for field staff:** Subcontractor and SI will collaboratively develop comprehensive manuals for field staff. SI must have a chance to review and approve final manuals at least 5 business days before the start of training. In some cases, SI may develop draft manuals, that will then be provided to the Subcontractor for review and further input. The manuals that will be developed for this activity include:
  - Interviewer manual
  - Supervisor manual
- **Comment on instruments:** SI will provide instruments to Subcontractor for review. As with the protocols, Subcontractor will review and provide feedback on SI's data collection instruments, and suggest revisions as needed for context, flow, translation, or other aspects. The instruments that will be used for this activity include:
  - PWD survey questionnaire
  - KIIs Interview guide
  - Extract information forms
- **Translate qualitative instruments:** The Subcontractor will be responsible for translating qualitative instruments into Vietnamese. While SI will translate the PWD survey instrument, it expects the Subcontractor to assess the translation quality and advise on revisions as necessary.
- **Obtain local research clearances and permits:** To prevent delays, SI will submit applications for local research clearances as needed (e.g. local IRB or research clearance body). However, the Subcontractor should be responsible to obtain any relevant permissions needed in order to enter specific sites in order to collect data (e.g. local government letters of introduction). SI and USAID will support this with official letters.
- **Data collector recruitment:** For the PWD survey, we ask the Subcontractor to enlist data collectors who reside in the targeted provinces, to enable continuous data collection as well as proactive queries with IPs and providers to obtain lists on a biweekly basis. If this is not feasible, the bidder must provide a detailed explanation of how they intend to administer an alternative plan that will not cause delays or excessive costs.



## Training and Piloting

- **Training:** Training will take place prior to data collection. Subcontractors are required to specify the recommended duration and content of field staff training as part of the technical approach. SI anticipates the PWD survey training will require at least 5 days. Subcontractors shall describe in their technical proposal their approach to assessing interviewers' readiness to conduct data collection during and after the training, i.e. specifically how they will determine non-performing trainees. It is recommended that more interviewers be trained than will be required for this data collection activity, so that top-performers are selected, as well as to maintain a pool of back-up interviewers; non-performing trainees will not be selected as part of the main or back-up teams. No interviewer is to be sent to the field until he/she has demonstrated sufficient understanding of the protocols. Representatives of SI will assist with the training and may test enumerators as needed and may require, at their discretion, replacement of enumerators deemed to be performing inadequately in training or in the field.
- **Piloting:** The Subcontractor must complete pilot data collection for the PWD survey and sit visit tool immediately following training. Particularly for the PWD survey, the pilot will focus on the questionnaire content and whether it is understandable and relevant to people with various disabilities, whether it is acceptable in content and length, and whether challenges in the process of data collection should be addressed. Following piloting, SI will work closely with the Subcontractor to modify the tools and manuals as necessary. The Subcontractor will support IRB amendments, if necessary. Piloting should be done on a sample of 50 PWDs and 4 service providers not part of the sample frame for the data collection. SI will work with IPs to obtain a list of eligible respondents.

## Data Submission

The Subcontractor must submit all data in clean, well labeled formats. SI will be responsible for all data analysis.

- **PWD survey data:** The Subcontractor will deliver a pilot, baseline, and follow-up dataset. SI must have access to view data on the cloud periodically throughout data collection for its own quality control purposes. The Subcontractor must complete data cleaning according to well documented, replicable procedures, as in through a Stata .do file or replicable SPSS program. All variables and values must be labeled. Datasets and corresponding codebooks should be submitted in Stata or SPSS format. If necessary, the Subcontractor may submit data in XLS or CSV files.
- **KII data:** The Subcontractor must provide SI with English verbatim transcripts as well as interview notes with metadata such as respondent characteristics, date, and interviewer information. Audio recordings should also be submitted. All files must be labeled clearly according to a consistent naming convention.
- **Site visit data:** The Subcontractor will deliver a pilot, baseline, and follow-up dataset. All data should be entered into a database, if not directly captured on a tablet program. These data should be shared with SI in a clean, labeled format.

## Quality Assurance

Subcontractors will be required to conduct quality control, at minimum following the requirements listed below. SI will be conducting independent quality assurance for the duration of this activity. Subcontractors will be required to respond in a timely manner to SI questions regarding data quality control and other measures of data quality assurance.

### *Led by Subcontractor:*

- Daily team debriefs: Check-ins with the interviewers and field staff to review any challenges faced, allow for questions and clarifications, and provide feedback to the wider group. These are especially important early in the data collection activity to ensure that proper interviewing habits are formed.
- Supervisor checks: Supervisors will check their teams' forms before they are submitted to the server, to ensure completeness and spot-check for errors.
- Accompaniment: Subcontractor will ensure that at least 5% of interviews are directly observed by a supervisor or other senior member of the team. All interviewers should be directly observed at least once during the first week of data collection. Observations will be summarized in an accompaniment form developed by Social Impact.
- Co-enumeration: Subcontractor will co-enumerate at least one interview per interviewer during the first two weeks of field work (fill in a duplicate version of the interview form concurrently during direct observation). Thereafter, at least 1% of interviews should be co-enumerated. SI also reserves the right to request co-enumeration for specific interviewers if questions are raised during SI's regular data quality checks.
- Back-checks: Subcontractor will conduct back-checks on 10% of the total sample, using a back-check tool developed by Social Impact. Back-check surveys should not be made available to enumerators. Back-checks should be conducted by separate teams from the enumerators, and they may be conducted by phone or in person. The Subcontractor is expected to work collaboratively with SI to determine the allocation of back-checks throughout data collection (e.g. all enumerators should have 10% of their surveys back-checked within the first two weeks, and thereafter back-checks may be specifically targeted to certain interviews or enumerators).
- Weekly data review: Subcontractor must download electronic datasets and perform completeness and logic checks, disaggregated by enumerator. They will document issues to be addressed in survey program, in clarification of questions to enumerators or respondents, and in re-training of enumerators. The Subcontractor will summarize for SI via email these findings and related actions needed. For critical missing data or other anomalies, the Subcontractor is expected to follow up with the enumerator and, if necessary, recontact the respondent for clarification.

### *Led by Social Impact:*

- Survey programming quality control: Various quality control measures will be programmed into the electronic survey. These may include: speed limits, logic checks, or audio audits.

The final set of quality control measures will be agreed upon by SI and the Subcontractor during preparations for data collection and finalization of the instrument.

- Social Impact will conduct independent weekly quality checks of the data downloaded directly from the server, summarizing any questions or feedback for the Subcontractor from each check. Subcontractors will be required to respond to these questions within 2-3 business days of receiving them.
- SI will also analyze back-check data and will summarize any questions or feedback for the Subcontractor from each check. Subcontractors will be required to respond to these questions within 3-5 business days of receiving them.

### Respondent Protection & Data Security

Subcontracts are required to abide by Social Impact's respondent protection and data security protocols (to be provided upon award). Subcontractors will be given an opportunity to comment on the protocol and provide feedback that allows SI to better contextualize the protocol (without modifying SI's "required minimums").

All field staff will be asked to sign a non-disclosure agreement (to be provided upon award) signifying their understanding of ethical behavior in the field and proper handling of respondents' confidential and private information, including personally identifiable information (PII).

Subcontractors will ensure proper measures are taken in the field to monitor enumerators' behavior with respect to respondent protection and data security (including interviewing, handling of devices, etc.).

Subcontractor will be required to adhere to COVID-19 prevention protocols put in place by local authorities as well as basic social distancing prevention strategies imposed by SI and approved by the local IRB. Protection of vulnerable PWDs, other respondents, as well as Subcontractor staff is of utmost importance to SI.

### Timeline

The timeline below is illustrative and subject to change and input from the Subcontractor. Immediately following subcontract finalization (expected by April 28, 2021), the Subcontractor will begin preparations and meetings with SI over a period of approximately 11 days. Then the Subcontractor will work with SI to complete training and piloting for the PWD survey instrument. This will be supported by an SI staff member from the Learns Office.

An international Rehabilitation and Health Systems Strengthening Specialist plans to travel to Vietnam in early June to support the training for qualitative interviewers and site visits as well as site visit piloting. To align with this visit (subject to change), the Subcontractor should plan to complete qualitative training beginning June 14, followed by a ~2-day pilot of site visit tools in four facilities, and followed by approximately three weeks of KII and site visit data collection.

Following the pilot and necessary changes and approvals of the revised tool, the PWD survey rolling baseline data collection will be done from approximately June 24 through end of

September, 2021. Meanwhile, the KII and site visit data collection will occur June 21-July 9, 2021.

Follow-up data collection for the PWD survey cohort, including a refresher training for enumerators, will occur six months following baseline, which is approximately January-April 2022 (noting we expect a pause in data collection during the Tet holiday). Training and data collection for KIIs and site visits is expected to take place around May 2022.

**Figure 1. Anticipated Timeline**

#	Task	Start	Finish	Duration*	Notes	2021												2022								
						Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun					
<b>1</b>	<b>Contracting</b>																									
1.1	SI posts RFP for local data collection firm	29-Mar	31-Mar	3		x																				
1.2	Data collection firm proposals due	1-Apr	14-Apr	10			x																			
1.3	SI review proposals and sign subcontract with local data collection firm	15-Apr	28-Apr	10			x																			
<b>2</b>	<b>Baseline Fieldwork</b>																									
2.1	DCF start-up, translate instruments, program into tablets if necessary	29-Apr	12-May	10	Begins immediately after contract signed.		x	x																		
2.2	Evaluation team PWD survey pilot kickoff meeting	13-May	13-May	1				x																		
2.3	Data collector training (PWD survey pilot)	13-May	19-May	5				x																		
2.4	Pilot test/validation of PWD survey; finalization of tools	20-May	23-Jun	25	~1-1.5 weeks data collection. Rest of time is reserved for revisions and approvals by IRB, as needed.			x	x																	
2.6	Training and field data collection (KIIs, site visits, record extraction)	14-Jun	9-Jul	20	Timing must be in June to align with SI traveler schedule. 1 week of prep and training. Data collection will last ~3 weeks				x	x																
2.7	Field data collection (PWD survey)	24-Jun	27-Sep	68					x	x	x	x														
2.8	Data firm cleans survey data and submits to SI	28-Sep	4-Oct	5								x	x													
<b>2</b>	<b>Follow up Fieldwork</b>																									
2.1	Follow-up PWD survey data collection (including refresher training)	30-Dec	4-May	90	~3 months rolling, but adding more time to account for pause during Tet																x	x	x	x		
2.2	Follow-up qualitative/record review data collection (including refresher training)	2-May	10-Jun	30																			x	x		
2.3	Data firm cleans survey data and submits to SI	5-May	11-May	5																			x			

\* Working days

Yellow = PWD survey focus
Green = KIIs, site visits, record extraction

### III. Deliverables & Payment Schedule

The Subcontractor will be required to submit the following deliverables. Social Impact will provide report templates as guidance to the Subcontractor following award.

- 1. Workplan:** Rather than a repetition of the scope of work, the workplan should specify details of *how* the Subcontractor intends to implement training, piloting, manage data collection, carry out data quality oversight, and complete data cleaning. This should specify who does what and when and how the Subcontractor will communicate with SI throughout the process.
- 2. Translated KII guides**

3. **Training materials:** Agenda, slides, data collector and supervisor manuals
4. **Weekly Progress Reports:** Emailed to SI in standard template to update on survey attempts and completion across each province along with data quality problems encountered and how they are being addressed.
5. **Pilot Report:** Brief format (5-10 pages) with description of activities completed, challenges, lessons learned, recommendations for future success, and revised tools and protocols attached.
6. **Baseline/Follow-up Data Quality Reports:** Following each round of data collection, the Subcontractor will issue a report that includes a description of activities completed, sample achieved by site, quality problems and how they were addressed, and final data collection instruments and manuals attached. These should be submitted within one week after the final dataset is submitted.
7. **Datasets:** As described under Data Submission above
8. **PWD Survey Guide and Lessons Learned Report:** Beginning in early 2022, USAID/Vietnam has an interest in continuing with the PWD survey effort by having its IPs collect QOL data using the same survey in other provinces in the future. In order to support this effort, the Subcontractor will create a guide that documents lessons learned from implementing the PWD survey (specifically the QOL measurement components and the process of PWD outreach and interviewing). It will also provide a user-friendly how-to guide for IPs. The enumerator and supervisor manuals should be modified for IP use and included as annexes. This should be submitted within 3 weeks of submission of the baseline dataset.
9. **Training support for future PWD survey administration by IPs:** SI, through the Learns project, will train IPs to carry out the PWD survey in other provinces. The Subcontractor, having vast experience with this, will be a critical partner in that effort, co-facilitating sessions with SI and helping to develop training materials.

The Subcontractor will submit invoices according to the payments listed below. Submission dates for each deliverable invoiced and SI approval dates should be specified on the invoice. Invoices cannot be submitted prior to SI accepting deliverables/milestones in writing. A payment schedule will be as follows:

Payment	Deliverables / Milestones	%
1	Work plan, translated KII guides, training materials approved by SI	5
2	PWD survey pilot training completed, Pilot dataset and report submitted and approved by SI	10
3	KII and site visit data collection training completed, KII, site visit data submitted to and approved by SI	15
4	Clean PWD survey baseline dataset submitted and accepted by SI, Baseline Data Quality Report accepted	25

	Bi-weekly reports through fieldwork phase	
5	PWD Survey Guide and Lessons Learned Report submitted and accepted by SI, training support provided	5
6	Follow-up data collection refresher training materials accepted by SI (all methods), trainings completed	10
7	Clean PWD survey follow-up dataset submitted and accepted by SI Bi-weekly reports through fieldwork phase	20
8	Clean KII, site visit follow-up data submitted and accepted by SI, Follow-up Data Quality Report accepted	10
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## Requirements for Bidders

### Personnel and Staffing Plan

Bidders should provide CVs for required team members (key personnel) positions as listed below, which meet the minimum qualifications. In this section, bidders should also describe their recruitment strategy for other field staff and should specify the total number of enumerators and supervisors that will conduct the activity along with the proposed supervisor to enumerator ratio (SI recommends, as best practice, a ratio of no more than 5 interviewers to 1 supervisor).

Bidders should also describe their plan to carry out data collection on a rolling basis in each province, including the proposed process of obtaining regular lists of new beneficiaries from IPs and service providers. Any experience doing similar things should be highlighted.

#### KEY PERSONNEL:

Key Personnel	Qualifications
Senior Research Manager <i>Serves as main point of contact and manager of the full effort</i>	Preferred 7+ years of relevant experience managing complex data collection exercises in Vietnam for both quantitative and qualitative studies. Experience implementing evaluations in the disability, social services, or health sector, or evaluations related to quality of life. Demonstrated orientation to detail; strong communicator.
Data Manager <i>Serves as primary person responsible for data quality, management, quality oversight, and cleaning</i>	Preferred 5+ years of experience managing complex datasets, cleaning data using Stata, SPSS, or other software (Stata or SPSS experience strongly preferred). Experience with electronic survey programming (SurveyCTO preferred but not required). Demonstrated strong organizational skills and attention to detail.

Bidders should describe their approach to ensure that well-qualified interviewers are hired. Interviewers should have relevant experience in household interviewing, especially regarding quality of life and health topics and data collection with PWDs or other vulnerable groups. All interviewers engaging with PWDs must have a sensitive, compassionate, and patient approach. Interviewers should be relatively balanced in gender. Qualitative interviewers responsible for KIIs must have at least two years of experience conducting qualitative interviews and a demonstrated successful approach to sensitive interviewing techniques. Recruitment and staffing procedures should be outlined in the technical proposal, along with contingencies for staff replacement, should the need arise, during data collection.

### Past Performance

Bidders should submit a summary of four relevant past performance reports, including contact information for references. SI reserves the right to contact references provided in these past performance reports. Examples include: demonstrated experience conducting data collection regarding quality-of-life topics and data collection with PWDs or other vulnerable groups, demonstrated experience successfully conducting surveys with a rolling baseline, experience with cohort tracking, experience using electronic data collection. This experience should reflect institutional capacity, not just that of individual team members. Of particular importance is relevant work in the management and implementation of data collection, with methodologies and with populations/locations as those in this scope of work.

## IV. Submission Instructions

Bidders should follow the instructions below for submission of questions and proposals:

### QUESTIONS

Please use subject line “Data Collection for the USAID/Vietnam Disabilities Project”

Please send to both email addresses in the “Contact” field on page 1 by the deadline for questions. Late submission of questions will be considered on a case-by-case basis by the SI project team.

### PROPOSALS

**Technical Proposals:** Bidders will submit technical proposals, using the page limitations described below. Material that exceeds the page limitations will not be reviewed or scored by SI. Technical proposals will not include any financial information; SI may disqualify bids that include financial information in the technical proposal. The technical proposal will consist of the following components, such that the full technical proposal does not exceed 17 pages (excluding CVs).

- Technical Approach: no longer than ten (10) pages. This should briefly describe your understanding of the tasks and elaborate on how you would approach each of the



components of the assignment: project management, training, piloting, participant outreach, cohort tracking, survey data collection using sensitive approaches for PWDs, qualitative interviewing techniques, site visit data collection, data quality assurance, and reporting. Bidders should also address anticipated risks and mitigation strategies for how you will attempt to monitor and control them.

- **Personnel:** no longer than three (3) pages including a) summary of key personnel qualifications and experience, b) description of additional personnel and roles, c) a description of how you will successfully manage the rolling baseline within each province over up to three months, along with examples of how you have managed such efforts in the past, if applicable d) CVs for key personnel (CVs do not count toward page limits)
- **Past Performance:** Four (4) past performance reports that use the template below, not exceeding four (4) pages.

Table 2. Past Performance Template

<b>Name of project:</b>	
<b>Client:</b>	
<b>Dates of performance:</b>	
<b>Brief description of client's project:</b>	
<b>Description of your firm's services provided (include sample sizes and data collection locations):</b>	
<b>List skills/activities relevant to this Disability Project evaluation</b>	
<b>Reference and contact information</b>	

**Financial Proposals:** The financial proposal must be submitted in separate files from the technical proposal. The financial proposal shall consist of a budget in Excel with traceable formulas and clear explanation of any assumptions made. Costs should be presented in USD.

Bidders are also required to submit a budget narrative (Word or PDF) summarizing key assumptions in the budget. Budget narratives should not exceed a total of three (3) pages.

**Submission:** Please use subject line "Data Collection for the USAID/Vietnam Disabilities Project". Please send to both email addresses in the "Contact" field on page 1 by the deadline for proposals. Late submissions will not be accepted.



### Scoring Criteria

Social Impact will weigh the following factors to score proposals:

- **Technical Proposal (40%)**: Compliance with requirements of scope of work; understanding of data collection activity requirements. Sound, experienced approach described for each aspect of assignment.
- **Personnel (20%)**: Compliance with required qualifications and overall demonstrated experience of the personnel presented.
- **Past Performance (20%)**: Demonstrated, successful experience conducting similar activities in comparable settings, as specified in the Scope of Work. This experience should reflect institutional capacity, not just that of individual team members.
- **Cost (20%)**: Compliance and alignment with technical scope of work; competitiveness; reasonableness.