**ANNEX 1: TECHNICAL PROPOSAL TEMPLATE**

|  |
| --- |
| **LIRNE*asia* Sri Lanka Social Safety Net Qualitative Study 2022:** **Technical Proposal – Summary details** |
| **Bidder (Authorized Entity) information** |  |
| **Company name** |  |
| **Registered address** |  |
| **Contact person** |  |
| **Email** |  |
| **Mobile number** |  |
| **Collaborating Entity 1 information** |  |
| **Company name** |  |
| **Registered address** |  |

***1) The Consultant’s Organization***

|  |
| --- |
| **1a) Brief profile about the firm leading the bid (Authorized Entity), indicating clearly the presence of legally incorporated offices under the prevailing laws in Sri Lanka, if applicable. No more than 1 page. Please attach scanned copies of Bidder and/or Collaborating Entity’s country valid and current business registrations.** |
|  |
| **1b) Brief profile of the first Collaborating Entity indicating clearly the presence of legally incorporated offices under the prevailing laws in Sri Lanka, if applicable. Any prior collaboration with Authorized Entity (if applicable) to be included. No more than ½ a page.**  |
| (Duplicate for each Collaborating Entity. Maximum of 3 Firms, including Authorized Entity allowed) |

|  |
| --- |
| ***1c) For Collaborations only:* Exact role and tasks to be performed by each Entity included in this Bid.**  |
|  | **Tasks** |
| Authorized Entity: <Insert Firm Name> | … |
| Collaborating Entity 1: <Insert Firm Name> | … |
| Collaborating Entity 2: <Insert Firm Name> | … |

|  |
| --- |
| **1d) Field strength and field strategy**  |
| Firm undertaking fieldwork (name) |  |
| Number of employees |  |
| Number of employees (full time and part-time) to be work in the project |  |
| Details of training of field recruiters and moderators; how training will be conducted (in-person or remotely), content, number of hours, by whom, language of training etc.. |  |

***2) Bidder’s Experience***

Please provide details of previous experience in carrying out qualitative studies that:

* Targets particularly of varying socioeconomic backgrounds and vulnerable communities
* Targets marginalized communities
* Targets vulnerable communities (persons with disabilities, elderly etc..)
* Targets beneficiaries of social protection schemes in Sri Lanka
* Includes data collection (primary data) in Sinhala and Tamil languages
* Deals with service delivery including financial services in Sri Lanka
* Deals with public sector offices in Ministries, Departments and Institutes in Sri Lanka
* Demonstrates experience in conducting studies to access the impacts of disasters/crises and/or during lockdown periods and/or during the pandemic among a variety of populations
* Demonstrates the ability to quickly adapt to changing ground conditions and ensure project objectives are met
* Demonstrates the ability to collect qualitative data remotely
* Demonstrates experience in handling large scale qualitative data using computer assisted qualitative data analysis software (CAQDAS)
* Demonstrates experience in conducting large scale qualitative research in multiple provinces in Sri Lanka

In the case of a consortia bid, work carried out by the Authorized Entity (i.e. lead partner in consortia) as well as Collaborating Entities may be listed to demonstrate required experience.

Complete the table below using 1 row per example/assignment. **Please provide no more than 10 examples, ensuring a minimum of two examples.**

**NOTE: Row sizes are fixed; text exceeding the maximum cell space will not be shown, and therefore not read by evaluators.**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|    | **Project name** | **1)Client****2)Start date** **(MM/YYYY)****3)Completion date** **(MM/YYYY)****4) Approx. USD project value** | **Study topic/sector** | **Country/ study locations** | **Target population and coverage** | **Data collection type (F2F, online, phone, etc)** |  **Data collection tools (IDIs, FGDs, KIIs, Observation)**  | **Sample size** |  **Use of CAQDAS (If yes mention the name of the software)**  | **Additional details** **(if any; 20 words or less)** | **Type of Contract (principle /JV/ Subcontracted) and specific role/tasks assigned**  | **Total number of employees assigned (full time, parttime, freelance, contract basis)**  |
| E.g. | Mobile use and financial services | 1. XY Foundation
2. 04/2011
3. 08/2011
4. > USD 400,000
 | Mobile and internet access | India | SEC D & E population aged 15-65) in Lucknow | F2F | FGDs | 100 | Atlas ti. | Objective to measure access and use, and identify barriers to use financial services | Principle. Research design, data collection, analysis and reporting | 10 (2 core team + 2 field supervisors). |
| 1 |  |  |  |  |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |  |  |  |  |  |  |
| 7 |  |  |  |  |  |  |  |  |  |  |  |  |
| 8 |  |  |  |  |  |  |  |  |  |  |  |  |
| 9 |  |  |  |  |  |  |  |  |  |  |  |  |
| 10 |  |  |  |  |  |  |  |  |  |  |  |  |

***3) Key Personnel / Team***

**3.1 Team Structure:**

Provide the names of persons that will fill the roles that are mandatory (one person may take up more than one role). Add other roles and describe responsibilities as desired. **Note that proposed overall Team Leader shall be the Client’s primary contact person for the full duration of the Study, shall be a permanent employee of the firm leading the bid and handling contracting (i.e. of the Authorized Entity) and shall not be replaced or removed from this role for the entire duration of the Study without explicit authorization of the Client. Other senior staff that will provide broad guidance and advice should be listed separately.**

|  |  |  |  |
| --- | --- | --- | --- |
| **ROLE** | **Name of proposed Team Member, organization, and proposed physical location during the Study** | **Years of Research experience** | **Tasks Assigned** |
| 1. Team Leader (Client’s primary contact person for duration of assignment)
 |  |  |  |
| 1. Moderator/s
 |  |  |  |
| 1. Qualitative Data analyst/s
 |  |  |  |
| 1. Field Manager/s
 |  |  |  |
| 1. Etc. (add as appropriate)
 |  |  |  |

**3.2 Key personnel/team member qualifications**

For the (1) Team Leader, please provide details of qualifications and previous experience that demonstrate competency in carrying out specific/assigned tasks below. In addition, please provide details of Moderator/s and Filed Manager/s.

|  |
| --- |
| Team Leader (No more than 1 page):  |
|  |

|  |
| --- |
| **Moderator- 1 (no more than 1 page) :** |
|   |

|  |
| --- |
| **Qualitative Data Analyst - 1 (no more than 1 page) :** |
|   |

|  |
| --- |
| **Field Manager - 1 (no more than 1/2 page) :** |
|   |

**4) Approach, methodology and quality assurance**

NOTE: All bids shall include consideration, costing and Gantt Charts for the Client Methodology (Methodology A) as a default and an alternate methodology (Methodology B) in the case that fieldwork has to stop/change due to a lockdown situation in the country. Associated costs with each variant (Methodologies A and B) should be given in the Bidder’s Financial Proposal.

|  |
| --- |
| **Methodology A (Client Methodology)** **Discussion and comments on proposed Client Methodology. No more than 2 pages.** |
|   |

|  |
| --- |
| **Methodology B****- Alternate methodology proposed by Bidder, in the event that the government imposes lockdown measures due to the COVID-19 pandemic during the fieldwork period, with justification. No more than 2 pages.** |
|  |

|  |
| --- |
| **Quality control procedures. Please specify the quality control mechanisms that will be taken for the Study at all stages: Moderator training, Research participant recruitment, conducting discussions, data storage and data analysis.**  |
|  |

**5) Proposed schedule illustrated in a Gantt chart**

The time required for finalizing discussion guides, Field staff/Moderator training, pilot test and making subsequent changes to discussion guide/s, research participant recruitment and getting appointments from Key Informants must be included in the time line. If an alternative methodology (Methodology B) has been proposed, a separate Gantt chart should be provided for that methodology.

|  |
| --- |
| **Gantt Chart for Client Methodology (Methodology A)** |
|  |

|  |
| --- |
| **Gantt Chart for Methodology (Methodology B - Alternative method of conducting the fieldwork in the event that the government impose lockdown measures due to the COVID-19 pandemic during the fieldwork period)** |
|  |

6**) Health and safety measures put in place to conduct fieldwork safely** (foremployees, field staff, respondents as well as any other relevant groups**) during COVID-19 pandemic**

Please explain all the health and safety measures put in place by the Consultant to conduct face-to-face surveys during the COVID-19 pandemic. The Consultant should clearly explain the steps taken to make sure the safety of both employees, field staff, respondents as well as any other relevant groups.

|  |
| --- |
| **Health and safety measures put in place to conduct fieldwork safely** **during COVID-19 pandemic** |
|  |

7**) Risk mitigation and attention to research ethics in data collection**

Please describe risk mitigation measures and methods of addressing research ethic concerns in data collection.

|  |
| --- |
| **Risk mitigation and attention to research ethics in data collection**  |
|  |

8**) Responsibilities of the Client**

Please indicate any responsibilities of the Client which the Bidder foresees.

|  |
| --- |
| **Responsibilities of the Client** |
|  |