

ANNEX 1: TECHNICAL PROPOSAL TEMPLATE

LIRNEasia <i>Human factors in the information disorder and finding measures to counter</i> 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	
Survey platform/software being used for the project (e.g., Survey Solutions, SurveytoGo, ODK, etc)	

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 or any other country (if applicable) and experience in working in Sri Lanka at least the past three years. 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 or any other country, and have been operating in Sri Lanka for at least the past three years. 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>	1. ...
Collaborating Entity 1: <Insert Firm Name>	1. ...
Collaborating Entity 2: <Insert Firm Name>	1. ...

1d) Field strength and field strategy				
Firm undertaking fieldwork (name)				
Number of full-time fieldwork staff				
Number of part-time fieldwork staff				
Number of temporary fieldwork staff to be recruited for the project				
Minimum qualifications and experience for recruiting fieldwork staff (specify supervisor/interviewers separately, and permanent/temporary if different):				
	No. of field teams	No. of supervisors (specify permanent vs temporary)	No. of interviewers	Details of training of field staff; how training will be conducted (including whether this will be in-person or remotely); number of days; by whom; language of training; whether mock fieldwork will be included, if so details; how Consultant will ensure consistency in training across locations (if more than one), etc.
Sri Lanka				

2) Bidder's Experience

Please provide details of previous experience in following:

- Nationally representative survey research in Sri Lanka
- Surveys targeting households and individuals, particularly of varying socioeconomic backgrounds, social media users vs. non users etc.
- Research where segmenting of Grama Niladhari divisions using hand drawn, Google or other maps
- Research where listing of households or other subjects has been conducted on the field with random sampling from the compiled list in a pre-defined sample locations
- Large scale experimental studies with more than 1 level of evaluation (i.e.; baseline vs. endline evaluation of the same respondent)
- Large scale Central Location Tests (CLT) where respondents are brought to a venue and interviewed
- Qualitative research targeting individuals, particularly of varying socioeconomic backgrounds, social media users vs. non users etc.
- Ability to quickly adapt to changing ground conditions and ensure project objectives are met
- Sufficient experience in conducting CAPI-based surveys on a large scale

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 (indicate if national representation)	Sampling method (indicate if field listing conducted, and what was listed)	Survey type (F2F, online, phone, etc)	Sample size	Data entry method (CAPI/PAPI)	Additional details (if any; 20 words or less)	Type of Contract (principle /JV/ Subcontracted) and specific role/tasks assigned	Full time employees assigned (indicate field staff separately)	Part time employees assigned or freelance temporary field staff
E.g.	Teleuse@BOP4	1) IDRC 2) 04/2011 3) 08/2011 4) > USD 400,000	Mobile and internet access	India, Pakistan, Bangladesh, Sri Lanka, Thailand, Indonesia (Java only)	SEC D & E population aged 15-65 (nationally representative, 95% CI, ±3-7% error margin)	Multi-stage cluster random sampling (including household listing)	F2F	6 country total - 11,000	CAPI	Objective to measure access and use, and identify barriers to same.	Principle. Fieldwork and data-entry/cleaning subcontracted, responsible for all else: Q'naire & sample design/sampling/field checks/monitoring/data analysis/report writing.	10 (4 core team + 6 field supervisors).	30 interviewers.

1		1)												
2		1)												
3		1)												

4		1)												
5		1)												
6		1)												

7		1)											
8		1)											
9		1)											

10		1)												
----	--	----	--	--	--	--	--	--	--	--	--	--	--	--

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 Survey experience	Tasks Assigned
1. Team Leader (Client’s primary contact person for duration of assignment)	-		-
2. Field Manager	-		-
3. Quantitative questionnaire scripter			
4. Quantitative data analyst			
5. Qualitative groups and IDI moderators (Bidders can nominate more than 1 moderator)			
6. Qualitative data analyst			
7. Etc.			

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. Separately please provide details for (2) Field Managers, (3) Quantitative questionnaire scripter, (4) Quantitative data analyst, (5) Qualitative FGD and IDI moderator(s), (6) Qualitative data analysts and any other relevant team members (minimum of six and maximum of eight team members/country) for key personnel.

1. Team Leader (No more than 1 page):

2. Field Manager (no more than ½ page) :

3. Quantitative questionnaire scripter (no more than ½ page) :

4. Quantitative data analyst (no more than ½ page) :

5. Qualitative groups and IDI moderator (no more than ½ page) :

6. Qualitative data analysts (no more than ½ page) :

(Duplicate up to total of 8 team members/ country; 1 page for the Team Lead. No more than ½ page for Field Manager and other team members)

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 an unforeseen situation in the country. If the Bidder has strong justification to propose another alternative method (Methodology C), then details of this should be provided in the relevant sections. Associated costs with each variant (Methodologies A, B or C) should be given in the Bidder's Financial Proposal.

4.1 Task A: Nationally representative survey

Client Methodology (Task B - Methodology A; mandatory)

The Client Methodology for Task A is detailed in Sections 3.1 of this RFP. Please complete the form below, indicating clearly the following:

- Concerns about the given methodology and any anticipated problems with suggested solutions

Task A - Methodology B (Mandatory)

In the event that there is an unforeseen situation that will impact the fieldwork, the Bidder is expected to have an alternate methodology which would achieve the remaining number of sample households. This methodology must explain how the Consultant will achieve the Study objectives (collect data from a nationally representative sample adhering to random selection at every stage of sampling, with derivable selection probabilities, in order to understand the factors impacting an individual's likelihood of being susceptible to manipulated information), while ensuring precision of results and cost-effectiveness and should be detailed in the box provided giving justification while addressing the below points:

- A detailed commentary including the pros and cons of the proposed Methodology B.

- A rough plan of deploying the methodology based on the level of fieldwork completion at the time of occurrence of the unforeseen event (i.e, early, middle or latter stages of fieldwork).
- A very brief explanation of Bidder's previous experience in conducting a survey using multiple methods of data collection
- Implications on the timelines, questionnaire content and the cost

Task A - Methodology C (optional):

If the Bidder wishes to propose another alternate methodology which can achieve the study objectives (i.e.; collect data from a nationally representative sample adhering to random selection at every stage of sampling, with derivable selection probabilities, in order to understand the factors impacting an individual's likelihood of being susceptible to manipulated information), while maintaining, if not bettering the precision of results and cost-effectiveness, this method should be detailed in the box provided giving justification while addressing the below points:

- A detailed commentary including the pros and cons of the proposed Methodology C, and why it is superior to Methodology A (Client Methodology), including trade-offs involved in data quality, cost, time and other applicable dimensions.
- Anticipated problems with suggested solutions

No more than 1 page of comments and discussions on each proposed methodology will be read.

**Task A: Nationally representative survey | (Methodology A (Client Methodology))
Discussion and comments on proposed Client Methodology. No more than 1 page.**

Task A: Nationally representative survey |_Methodology B

- Alternate methodology proposed by Bidder, in the event that there is an unforeseen situation that will impact the fieldwork during the fieldwork period, with justification. No more than 1 page.

Task A: Nationally representative survey |_Methodology C (optional)

- Alternate methodology proposed by Bidder, if at all, with justification. No more than 1 page.

4.2 Task B: Experimental study (includes both quantitative and qualitative modules)

Client Methodology (Task B - Methodology A; mandatory)

The Client Methodology for Task B is detailed in Sections 3.2 of this RFP. Please complete the form below, indicating clearly the following:

- Concerns about the given methodology (both quantitative and qualitative) and any anticipated problems with suggested solutions

Task B - Methodology B (Mandatory)

In the event that there is an unforeseen situation that will impact the fieldwork, the Bidder is expected to have an alternate methodology which would achieve the remaining number of sample households. This methodology must explain how the Consultant will achieve the Study objectives (collect data from a sample based on the quotas provided by Client, in order to measure the effectiveness of different digital literacy capacity building programs and fact checking methods in countering the information disorder and how can these be improved to have more impact), while ensuring precision of results and cost-effectiveness and should be detailed in the box provided giving justification while addressing the below points:

- A detailed commentary including the pros and cons of the proposed Methodology B.
- A rough plan of deploying the methodology based on the level of fieldwork completion at the time of occurrence of the unforeseen event (i.e, early, middle or latter stages of fieldwork).
- A very brief explanation of Bidder's previous experience in conducting a survey using multiple methods of data collection
- Implications on the timelines, questionnaire content and the cost

Task B - Methodology C (optional):

If the Bidder wishes to propose another alternate methodology which can achieve the study objectives (i.e.; collect data from a sample based on the quotas provided by Client, in order to measure the effectiveness of different digital literacy capacity building programs and fact checking methods in countering the information disorder and how can these be improved to have more impact), while maintaining, if not bettering the precision of results and cost-effectiveness, this method should be detailed in the box provided giving justification while addressing the below points:

- A detailed commentary including the pros and cons of the proposed Methodology C, and why it is superior to Methodology A (Client Methodology), including trade-offs involved in data quality, cost, time and other applicable dimensions.
- Anticipated problems with suggested solutions

No more than 1 page of comments and discussions on each proposed methodology will be read.

Task B: Experimental study | (Methodology A (Client Methodology))
Discussion and comments on proposed Client Methodology. No more than 1 page.

Task B: Experimental study |_Methodology B

- Alternate methodology proposed by Bidder, in the event that there is an unforeseen situation that will impact the fieldwork during the fieldwork period, with justification. No more than 1 page.

Task B: Experimental study |_Methodology C (optional)

- Alternate methodology proposed by Bidder, if at all, with justification. No more than 1 page.

Quality control procedures:

Please specify the quality control mechanisms that will be taken for the Study at all stages (for both Task A and Task B); strategies to ensure security of data, avoid loss of data on the field and any other foreseeable risks that may affect data quality should be detailed. No more than 1 page. *Note: Health and safety measures should be detailed separately in Section 6 below.*

Gantt Charts for Task B:

Gantt Chart for Client Methodology (Task B Methodology A)

Gantt Chart for Task B Methodology B (Methodology B - Alternative method of conducting the fieldwork in the event that there is an unforeseen situation that will impact the fieldwork)

(Duplicate above table if alternative methodology, i.e. Methodology C is proposed for Task B)

6) Health and safety measures put in place to conduct fieldwork safely

Please explain the health and safety measures put in place by the Consultant to conduct face-to-face surveys.

Health and safety measures put in place to conduct fieldwork safely

7) Responsibilities of the Client

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

Responsibilities of the Client