

REQUEST FOR QUOTATIONS

Tanzania N=1,000 nationally representative face-to-face survey data collection Financial Inclusion Insights (FII) Program – Harmonization

Date Issued: 8 June 2018
Deadline for Quotations: 15 June 2018 by 5:00pm East Africa Time

Vendors are requested to provide a detailed price quotation and technical qualifications for implementing a nationally representative face-to-face survey, N=1,000, in Tanzania

This RFQ in no way obligates InterMedia to award a subcontract nor does it commit InterMedia to pay any cost incurred in the preparation and submission of a proposal. Award of any subcontract(s) under this RFQ is subject to availability of funds and approval of the Funder.

SCOPE OF WORK

Background

Since 2013, InterMedia has been conducting Financial Inclusion Insights (FII) surveys in Africa and Asia to explore the uptake and usage of digital financial services (DFS) among the adult population (aged 15 and older). In the past, the FII questionnaire entailed a lengthy and comprehensive interview on a wide variety of financial behaviors and attitudes. Now, InterMedia has developed a short-form questionnaire that will be used in Tanzania to collect key financial inclusion indicator data only. The questionnaire will require 20 minutes to administer.

The target population is adults aged 15 and older. The sample will be designed in collaboration between InterMedia and the selected Subcontractor. Data will be collected throughout Tanzania, except military bases and other restricted areas. The survey will be conducted using computer assisted personal interviewing (CAPI) using the Survey to Go (STG) software on suitable mobile devices supplied by the Subcontractor. The Subcontractor will be given “project administrator” rights on InterMedia’s STG account to access the questionnaire script, interview uploads, and server data storage supplied by InterMedia at no cost to the Subcontractor. The Subcontractor is responsible for the management and direct implementation of the survey ramp-up, fieldwork/data collection, quality control, and dataset finalization.

Activities

a) Country-Specific Questionnaire Inputs

InterMedia’s short-form FII questionnaire will require limited country-specific inputs. The Contractor is responsible for reviewing the questionnaire and providing feedback on respondent comprehension and appropriateness of questionnaire items for the local context.

b) Translation of the Questionnaire

The contractor is responsible for translating the final questionnaire and STG script into Swahili. After completing the translation, the Contractor must back-translate the questionnaire to English and provide a detailed report on the results.

c) Scripting and Pretesting the Questionnaire

InterMedia will script the questionnaire for administration by the Contractor using the Contractor’s devices. All scripting will be done by InterMedia using the software, SurveyToGo, in InterMedia’s organizational account. The Subcontractor will test the script to identify necessary improvements and work

with the InterMedia scripting team to implement necessary changes to ensure that the script functions perfectly before the start of data collection. The Subcontractor will be given Project Administrator rights to use InterMedia's STG account to manipulate the script. **The Subcontractor must not make any changes to the script without advance, written approval from InterMedia.**

The Contractor is responsible using its devices to pre-test the scripted questionnaire in English and all its translated versions. The pretest will include approximately 25 interviews in Dar es Salam and 25 interviews in a nearby rural area. The Contractor must deliver a pretest report with an item-by-item accounting of the results of the pre-test of the translated scripts to InterMedia. InterMedia will revise the questionnaire based on the Contractor's inputs and modify the script as necessary.

d) Pilot Test of the Questionnaire

During the field training the Contractor is responsible for a pilot test of the questionnaire in its translations. The pilot is the field practice portion of the training. The pilot test must have a minimum of 2 interviews per trainee and should be conducted in both rural and urban areas. The pilot test must take place in areas that are included in the survey sample. More than two enumeration areas (EAs) must be used for the pilot to avoid respondent clustering. After the completion of the pilot test, a centralized debriefing session will be held, in which any difficulties the interviewers and respondents had with the administration of the questionnaire will be discussed. At this time the InterMedia trainers will correct mistakes teams made during the field practice and to answer questions on field procedures. If the pretest is properly conducted, minimal changes will result from the training and data collection can then be launched immediately at end of training. Within one day after the end of the debriefing, the Contractor must provide a written report on the outcome of pilot test to InterMedia along with recommendation on the changes to be made to the questionnaire.

e) Sampling

The sample will be designed by InterMedia in collaboration with the subcontractor. The design will be a stratified multistage cluster sample with area units, such as census enumeration areas, selected as primary sampling units (PSUs). In each PSU, 10 households will be selected in the second stage of sampling. Household selection will be done using the random walk methodology. In the final stage of selection, one adult household member aged 15 and over will be selected in each sampled household using the Kish grid method in the STG script. Then, the survey questionnaire will be administered to the selected respondent. In cases where an interview cannot be completed with the selected respondent, the Subcontractor is required to make three (3) call backs at times of the day when the respondent is expected to be available to complete the interview before a non-response is recorded and a replacement household is selected.

f) Fieldwork Plan

The Contractor must create a detailed plan for realizing the nationally representative sampling design provided by InterMedia with respect to all logistical and staffing arrangements, including locating and evaluating the accessibility of all PSUs. If a PSU is identified as inaccessible during fieldwork planning or during fieldwork, this information must be communicated immediately to the InterMedia point of contact, and InterMedia will select a replacement PSU as soon as possible. In no case will the Contractor select a replacement independently.

The fieldwork plan will provide details on when interviews will take place in each PSU and which team of data collectors will complete interviews. This information will be used by InterMedia to organize monitoring activities using an independent quality control team that will be separately managed by InterMedia. **The Subcontractor will fully cooperate with InterMedia's designated quality control provider(s) to facilitate unannounced onsite monitoring of ongoing data collection by monitors operating independently of the Subcontractor's data collectors.** All changes to the fieldwork plan, for

example rescheduling fieldwork in a PSU to a different day, must be communicated immediately to the InterMedia point of contact.

g) Quality Control

The Subcontractor must provide quality assurance and control (QA/QC) through training, supervision and monitoring of teams during fieldwork, including direct observations of interviews and spot checks. The subcontractor must submit a QC plan along with their fieldwork plan before the start of data collection. The QC plan must provide specific details on the quality assurance measures that will be taken during data collection, such as supervisor accompaniment, field reporting structures, and feedback and mechanisms that will allow for timely corrections of any problems identified in the field.

At least 15% of all interviews will be directly observed by supervisors, and least 10% of interviews will be spot checked. Additionally, at least 30% of interviews will be verified by phone. InterMedia will undertake independent quality control activities to provide a layer of monitoring on top of the subcontractor's own quality control procedures. Work sessions may be held with field teams, with the goal of reinforcing the training received and correcting all data collection errors.

h) Recruitment and Training

The Contractor is responsible for the timely recruitment of qualified enumeration teams, including interviewers and field supervisors with local language fluency. Supervisors should be chosen from the best trainees that show clear understanding of the survey objectives, questionnaires and field procedures. All field staff must be able to conduct CAPI interviewing and have the necessary skills to use the required technology.

The Contractor also is responsible for organizing, hosting and handling all local logistical preparations for the training of field staff. The training will last four (3) full days, including two (2) full days of field practice for field staff. InterMedia will provide the training program and the training manual and the Contractor is responsible for translating the training materials into the appropriate local language(s). The Contractor must provide appropriate translation facilities for the InterMedia staff to provide training in local languages other than English. The training should be carried out at a central location. InterMedia will send a representative to facilitate the training course.

In preparation for the training of field personnel InterMedia will provide draft training materials to the Subcontractor. The Subcontractor will arrange training for the survey as soon as questionnaires (English and local languages) and the CAPI script have been finalized. Training will last at least six days, including four days of classroom sessions and two days of field practice in both urban and rural areas.

Subcontractor's responsibilities for recruiting and training field personnel include:

- Adapt the training materials to local context and if necessary, translate them to the local language used for training of field personnel
- Recruit necessary staff for the training. The Subcontractor must ensure that sufficient people are hired as well as sufficient people to cover the various languages/divisions that will be included in the survey.
- Identify and provide the technical team that will be in charge of all aspects of the training. InterMedia will send a representative to assist in the facilitation of the training course.
- The Subcontractor will provide administrative arrangements and logistics throughout the training. This will include the training venue, transportation of field staff, and the location to conduct field practice immediately following the training of field staff. InterMedia reserves the right to reject the training

venue in the case that InterMedia determines that the venue proposed by the Subcontractor does not meet the minimum requirements for delivering the training course.

- **Provide one tablet/smartphone per interviewer during the training and ensure that devices are functional, charged, software is installed and updated, and all device settings are correct for conducting interviews in the field, including device time, network, and GPS settings.** Tablets/smartphones must be geo-enabled and compatible with all features of the STG software used to script the survey questionnaire.

i) Data Collection

Data will be collected using suitable handheld devices provided by the Contractor using the SurveyToGo application to administer the scripted questionnaire. The Contractor is responsible for proving all devices and must ensure that devices are geo-enabled and compatible with SurveyToGo. The Contractor must ensure that all interviews are administered using devices that meet requirements in terms of specifications and battery life, as well as backup logistical arrangements in the field, including reserve power banks. GPS coordinates must be collected for all households where interviews take place.

Subcontractor's responsibilities for data collection and fieldwork monitoring include:

- Acquire all permissions necessary for conducting the survey and adhere to local formalities.
- Provide updates to InterMedia on fieldwork progress and carry out fieldwork supervision throughout the data collection process. This includes close communication at all times between the Subcontractor, field teams, and InterMedia throughout the survey.
- Conduct fieldwork supervision trips to ensure quality control through the observation of interviews and the use of field check tables (periodically run by InterMedia).
- Based on supervision and field check tables, the Subcontractor will discuss with the appropriate teams, and make necessary changes/reinforcements to ensure that these problems do not persist.
- Resolve any problem that may occur in the use of tablets/smartphones including the provision of back-up batteries.

The Subcontractor must submit weekly reports on the progress of work throughout the life of the project. The weekly reports must provide details on the reasons for any deviations from the approved fieldwork plan and how any problems identified by InterMedia were addressed.

j) Dataset Finalization

The Contractor is responsible for the production and delivery of separate cleaned final data sets in SPSS. The production of the dataset(s) will include three or more rounds of data checking and cleaning in close consultation with InterMedia data analysts to arrive at the final dataset(s) that passes all quality checks and is suitable for public dissemination. These checks involve item-by-item identification of errors and inconsistencies in the data identified in reports sent to the Contractor. The checks include, but are not limited to:

- Reviewing the data file to ensure it is structurally sound, and consistent with the codebook, such that all variables included in the codebook are present in the dataset, of the right type, and contain matching values, including administrative variables and metadata
- Identifying missing data that must be captured through follow-up interviewing
- Conduct checks for anomalies in the data, including:
 - Checking of the eligibility for interview of the respondent according to instructions in the questionnaire

- Checking that all values in a variable are within the variable’s defined range
- Outlier interview durations and daily number of interviews per interviewer
- Overlapping interview times conducted by the same interviewer
- Checking the metadata to verify the implementation of the sampling plan such that the location where data was collected matches the sampling plan
- GPS coordinates of surveyed areas are within the country where the survey was conducted
- Duplicate GPS coordinates for households
- Interviews that are identical or respondents who have been interviewed twice (duplicate cases)
- Cases that have the same answers across a series of questions regardless of the interviewer (pattern response)
- Interviewers that had the same responses for particular questions across all of his/her interviews (substantive response bias)

The Contractor is responsible for working with the InterMedia team on addressing any issues raised in the data checking process and to complete the timely revision of datasets as needed. The Contractor must clean the data following the guidance provided in each data check report. Data checking will continue until the Contractor has satisfactorily resolved all errors and inconsistencies identified by InterMedia.

k) Technical Report

The Subcontractor will be required to provide InterMedia with a full technical report within two weeks of the completion of the final dataset; however, drafting the report should begin prior to the completion of dataset finalization. InterMedia will provide a template for the technical report, which will encompass the sampling plan, and any deviations from the plan, issues encountered in the field, response rates, etc. The technical report will be based on the template provided by InterMedia.

Deliverables

#	Deliverables
1	Translated questionnaires
2	Pretest report
3	Pilot test report
4	Fieldwork plan
5	Quality Control Plan
6	Weekly status reports
7	Final clean SPSS data set
8	Final technical report

Payment Schedule

#	Milestone payment percentage of total contract value
1	20% on contract award
2	40% on approval of Deliverables 2, 3, 4, and 5
3	20% on approval of Deliverables 6 and 7
4	20% on approval of Deliverable 8