

**REQUEST FOR PROPOSAL**

**PROCUREMENT OF CONSULTANCY SERVICES TO CONDUCT A SURVEY AMONG COCONUT FARMERS**

P.R. No./Date Received: 2021-05-0077 / 04 June 2021

RFQ/P No. / Date: 2021-06-0076 / 10 June 2021

The Philippine Competition Commission invites all eligible and PhilGEPS-registered suppliers, contractors and consultants to quote the best offer for the described item in the attached **Terms of Reference / Technical Specifications Sheet** subject to the Terms and Conditions and within the **Approved Budget for the Contract**.

**Required Documents/Information to be submitted as Attachments to the Quotation/Proposal:**

- Mayor's/Business Permit / BIR Certificate of Registration in case of individual.
- PhilGEPS Registration Number
- Latest Income/Business Tax Return
- Notarized Omnibus Sworn Statement
- Signed Terms of Reference / Technical Specifications Sheet
- Curriculum Vitae / Professional License
- List of Ongoing projects (including awarded by not yet started contracts) and previous engagements
- Proposed Plan of Approach and Methodology
- Company Profile

This pro-forma quotation maybe submitted through **registered** or **electronic mail** to the PCC Bids and Awards Committee (PBAC) Secretariat at above address or email to [procurement@phcc.gov.ph](mailto:procurement@phcc.gov.ph) or [bagelani@phcc.gov.ph](mailto:bagelani@phcc.gov.ph) on or before **17 June 2021, 5:00 PM** subject to the following **Terms and Conditions**:

1. All entries shall be typed or written in a clear legible manner.
2. No alternate quotation/offer is allowed, suppliers who submitted more than one quotation shall be automatically disqualified.
3. All prices offered herein are valid, binding and effective for THIRTY (30) calendar days upon issuance of this document. Alternative bids shall be rejected.
4. Price quotations to be denominated in Philippine Peso shall include all applicable government taxes subject to **(BIR 2306)** 5% R-VAT and **(BIR 2307)** 1% (PO) or 2% (JO) deductions.
5. PCC PBAC Technical Working Group may require you to submit documents that will prove your legal, financial and technical capability to undertake this contract.
6. Salient provisions of the IRR of RA 9184: Section 68 - Liquidated Damages and Section 69 - Imposition of Administrative Penalties shall be observed.
7. PCC reserves the right to reject any and all quotations, declare a failure, or not award the contract pursuant to Sec 41 of the same IRR.
8. In case of tie quotations, suppliers' presence are required during tie breaking through draw lots or toss coin.
9. In case supplier pro forma quotation is submitted, conditions will be governed by the submitted signed **Terms of Reference / Technical Specifications Sheet**.

Very truly yours

  
**JESON Q. DE LA TORRE**  
PBAC Chairperson

Item	QTY	ABC	Project Title	Total Amount
				(To be filled-up by the supplier)
1	1	lot	Procurement of Consultancy Services to Conduct a Survey among Coconut Farmers	
			(Please see attached Terms of Reference)	
<b>Total Lot ABC</b>		<b>P 1,000,000.00</b>	<b>TOTAL Amount</b>	
<b>Delivery Instructions:</b>			<i>Please see attached Terms of Reference</i>	

(Please provide **complete** information below)

We undertake, if our Proposal is accepted, to supply/deliver the goods in accordance with the specifications and/or delivery schedule.

We agree to abide by this proposal for the price validity period specified in the terms and conditions and it shall remain binding upon us and may be accepted at any time before the expiration of that period.

Until a Purchase/Job Order or a Contract is prepared and executed, this Quotation/Proposal shall be binding upon us. We understand that you are not bound to accept the lowest or any Proposal you may receive.

Signature over Printed Name : \_\_\_\_\_

Designation/Position : \_\_\_\_\_

Name of Company : \_\_\_\_\_

Address : \_\_\_\_\_

Telephone / Fax : \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Company Tax Identification Number : \_\_\_\_\_



## **TERMS OF REFERENCE**

### **Consultancy Services to Conduct a Survey among Coconut Farmers**

#### **I. RATIONALE AND BACKGROUND**

The Philippine Competition Commission (“PCC”) is an independent quasi-judicial body established under Republic Act No. 10667, otherwise known as the Philippine Competition Act (“PCA”), to promote and maintain market competition for the benefit of consumers and businesses. Among its functions, the PCC is mandated to monitor and analyze the practice of competition in markets that affect the Philippine economy. A sector inquiry on the Philippine coconut industry was commenced to provide the PCC with an in-depth understanding of the operational landscape and competition in different segments of the value chain. To determine and better understand any underlying competition issues, PCC aims to conduct a survey among farmers engaged in coconut production.

The survey will be conducted in Quezon Province, Sorsogon, Leyte, Samar, Zamboanga del Norte, and Davao de Oro. The data to be gathered will be representative at the provincial level. The details of the survey are summarized as follows:

<b>Type of survey</b>	Provincial survey
<b>Expected survey design</b>	Multistage Probability Sampling or Stratified Random Sampling
<b>Target Population</b>	Farmers engaged in coconut production
<b>Survey area</b>	Quezon Province, Sorsogon, Leyte, Samar, Zamboanga del Norte, Davao de Oro
<b>Sample size</b>	At least 300 coconut farmers
<b>Duration of the project</b>	90 calendar days from the date of contract signing
<b>Approved Budget for the Contract (ABC)</b>	PhP 1,000,000.00

#### **II. OBJECTIVE**

This engagement aims to gather information on individuals engaged in coconut production. Data gathered will include information about production, pricing, and trading and marketing practices of farmers. The survey results will aid the research team in understanding competition issues within the sector.

#### **III. SCOPE OF WORK**

##### **A. Tasks**

The service provider will be engaged for a duration of ninety (90) calendar days from the date of issuance of the Notice to Proceed.

The service provider shall carry out the following tasks:

## **Pre-survey Activities**

### **1. *Revise, test, and finalize the survey instrument***

- a. Review of draft survey questionnaire provided by PCC;
- b. Format the draft survey questionnaire into a survey instrument;
- c. Translate the survey instrument into other languages/ dialects, as needed;
- d. Pilot test the survey instrument among 6 respondents (one for each survey area) and provide feedback to PCC for any possible revision;
- e. Finalize the survey instrument in coordination with PCC staff; and

#### ***Deliverables***

1. Survey instrument for pilot testing of 6 respondents;
2. Electronic files of datasets and report from the pilot testing (raw and modified in CSV, Excel or any other Stata or R ready format) and data dictionary;
3. Final survey instrument in English, Filipino and other major languages, as needed; and
4. Final work plan schedule from pilot testing to fieldwork.

### **2. *Prepare sampling design***

- a. Determine the sampling design (This should include, among other details, the following: proposed sampling frame, type of probability sampling method, details for the selection of qualified respondent);
- b. Specify the sample size calculation for a provincial level estimate and for each domain/stratum (This should include, among other details, the following: formula for computing the sample size, key variables for sample size calculation such as margin of error, standard deviation, level of significance, etc.);
- c. Identify the method of selecting the qualified respondents, and the process of substitution in case of non-response;
- d. Prepare the sampling frame of qualified respondents and submit the complete list of respondents together with their up-to-date contact details to the PCC; and

#### ***Deliverables***

1. Final sampling design and methodology including alternative respondents in case of non-response; and
2. Final sampling frame of qualified respondents together with their up-to-date contact details.

### **3. *Plan, design and implement training for enumerators, data encoders and field supervisors***

- a. Recruit and train the enumerators and field supervisors on data collection, and on handling questions and problems that may arise during the field work (This shall include, among other topics, familiarity with the PCC and PCA, a run through of the questionnaire's questions and skip pattern, and a discussion of substitution process in case of non-response) Training should be after the pre-test and finalizing of the sampling, in order to integrate learnings from said activities to the training;
- b. Prepare the field work protocols for the enumerators and field supervisors; and
- c. Prepare and submit enumerator's manual.

### ***Deliverables***

1. Final enumerator's manual;
2. Report on the list of names and composition of the field team members including the number of enumerators, field supervisors and data encoding staff, and their qualifications and responsibilities; and
3. Report on the training of the required staff.

## **Data Collection, Processing and Reports**

### ***4. Deploy field enumerators and supervisors for the actual survey***

- a. Prepare the necessary materials and equipment;
- b. Secure relevant permits from the authorities in the concerned communities;
- c. Secure all other permits necessary for the conduct of the survey and other relevant activities;
- d. Inform, in writing, the PCC of the schedule of field operations and give relevant updates;
- e. Deploy enumerators to the field to conduct the actual survey;
- f. Conduct interviews through various methods as appropriate (e.g. telephone, video call, or in-person if feasible) with qualified respondents for a minimum of 300 respondents. Use of Computer Assisted Personal Interview (CAPI) is desirable.

### ***Deliverables***

1. Report on the status of the survey, including difficulties encountered, possible deviations from the original plan, and a documentation of attempts in cases of non-response.

### ***5. Encode and clean data, and deliver descriptive reports of the survey result***

- a. Encode the collected data;
- b. Clean and validate data files;
- c. Prepare the descriptive report and tables of the survey results; and
- d. Deliver data files (raw and modified data sets) in CSV, ASCII, Excel or any other Stata-ready format with data dictionary.

### ***Deliverables***

1. Protocol for data entry and quality control measures;
2. Electronic files of datasets (raw and modified in CSV, Excel or any other Stata or R ready format) and data dictionary; and
3. Electronic copy of preliminary results of the survey (e.g., frequency of responses) and the descriptive tables and report of the survey results.

## **Post-survey Activities**

### ***6. Deliver reports and maintain coordination with PCC staff***

- a. Deliver reports and other materials used in the survey; and
- b. Respond to inquiries from PCC on survey implementation, and data encoding and management within at most 10 days after the delivery of the complete set of electronic files of datasets and data dictionary.

### ***Deliverables***

1. Narrative report to the PCC on the outcome of the survey, including issues encountered throughout the project;
2. Hard copy and electronic form (in .pdf, .doc or .xlsx as applicable) of documents and other materials used in the survey; and
3. Written response to the PCC's inquiries, as needed.

### **B. Survey mode and length**

Completed survey interviews with at least 300 individuals from different households aided with a questionnaire will be done. Each interview is expected to last for 60 to 90 minutes.

### **C. Target respondents, sample size, sampling method**

The target respondents of the survey will be farmers engaged in coconut production. The survey will adopt a sampling methodology that will generate a dataset that is representative at the provincial level and for each domain/stratum. The survey will be provincial in scope representing the following provinces: Quezon Province, Sorsogon, Leyte, Samar, Zamboanga del Norte, and Davao de Oro. The service provider may use either multistage probability sampling or stratified sampling based on specified variables (e.g., margin of error, level of significance and standard deviation). The firm is free to propose categories that determine clusters/strata, for as long as it remains representative. The service provider will propose the sampling frame, and the method of allocating and selecting the sampling and elementary units. The desired margin of error is at most 3% for a provincial level estimate and at most 6% for the domain or for each stratum, with a confidence level of 95%. At least 300 completed interviews are required for the survey.

## **IV. SERVICES TO BE PROVIDED BY THE PCC**

1. Provide the service provider a directive to facilitate the execution of the survey;
2. Provide the service provider with the draft survey questionnaire;
3. Constantly coordinate with the service provider on the planning and implementation of each survey to be conducted; and
4. Pay the project cost inclusive of mandatory taxes and in accordance with the set payment schedule.

The service provider shall be engaged by the PCC and shall submit outputs directly to the designated project manager within PCC for review and endorsement for payment.

## **V. APPROVED BUDGET FOR THE CONTRACT AND MODE OF PROCUREMENT**

The Approved Budget for the Contract (ABC) is **one million pesos only (PhP 1,000,000.00)**, and shall be inclusive of all applicable government taxes, and shall include all remunerations, costs or profits arising from or in relation to the services rendered in connection with and/or in preparation for this engagement, such as, among others, survey preparation to the actual conduct of the survey and delivery of post-survey documents and reports.

The mode of procurement shall be Negotiated Procurement – Small Value Procurement under the Revised Implementing Rules and Regulations (IRR) of Republic Act (R.A.) No. 9184.

## VI. TIMELINES, DELIVERABLES, SCHEDULE, AND MODE OF PAYMENT

The service provider shall be engaged for ninety (90) calendar days immediately after the issuance of the Notice to Proceed to the Service Contractor – with fifteen (15) calendar days for preparation and pre-survey activities, sixty (60) calendar days for the actual survey, data collection and processing, and fifteen (15) calendar days for post-survey activities and the delivery of electronic files of datasets. The bidder shall provide its proposed implementation schedule indicating the specific activities and corresponding outputs using a Gantt chart.

Reports and other relevant documents are to be submitted to and should be duly received by the PCC project manager. Below is the summary of the deadline of submissions for each deliverable:

<b>MILESTONES</b>	<b>DELIVERABLES</b>	<b>Submission Date</b>	<b>% of contract amount</b>
Date of Contract Signing (Day 1)	Duly signed Financial Proposal to cover the cost of the project.		10%
<b>Pre-survey activities</b> 1. Revise, test, and finalize the survey instrument 2. Prepare sampling design 3. Plan, design and implement training for enumerators, data encoders and field supervisors	Printed and original signed documents duly received and accepted by the PCC, as follows: <ul style="list-style-type: none"> <li>• Survey instrument for pilot testing of 3 respondents</li> <li>• Electronic files of datasets and report from the pilot testing (raw and modified in CSV, Excel or any other Stata or R ready format) and data dictionary (Transmittal evidencing the submission of this deliverable should also be submitted as proof of submission of the files, duly received by the PCC)</li> <li>• Final survey instrument in English, Filipino and other major languages/dialects, as needed</li> <li>• Final work plan schedule from pilot testing to fieldwork</li> <li>• Final sampling design and methodology, including alternative respondents in case of non-response</li> <li>• Final sampling frame of qualified respondents together with their up-to-date contact details</li> </ul>	<b>Within fifteen (15) calendar days from contract signing</b>	20%

<b>MILESTONES</b>	<b>DELIVERABLES</b>	<b>Submission Date</b>	<b>% of contract amount</b>
	<ul style="list-style-type: none"> <li>• Final enumerator’s manual</li> <li>• Report on the composition of the field team, including the number of enumerators, field supervisors and data encoding staff, and their qualifications and responsibilities</li> <li>• Report on the training of the required staff</li> </ul>		
<p><b>Data Collection and Processing</b></p> <ol style="list-style-type: none"> <li>1. Deploy field enumerators and supervisors for the actual survey</li> <li>2. Encode and clean data, and deliver descriptive reports of the survey result</li> </ol>	<p>Printed and original signed documents duly received and accepted by the PCC, as follows:</p> <ul style="list-style-type: none"> <li>• Report on the status of the survey including difficulties encountered and possible deviations from the original plan, and a documentation of attempts in cases of non-response.</li> <li>• Protocol for data entry and quality control measures.</li> <li>• Electronic files of datasets (raw and modified in CSV, Excel or any other Stata or R ready format) and data dictionary (Transmittal evidencing the submission of this deliverable should also be submitted as proof of submission of the files, duly received by the PCC).</li> <li>• Electronic copy of preliminary results of the survey (e.g., frequency of responses) and the descriptive tables and report of the survey results (Transmittal evidencing the submission of this deliverable should also be submitted as proof of submission of the files, duly received by the PCC)</li> </ul>	<p><b>Within sixty (60) calendar days from the acceptance of deliverables for pre-survey activities</b></p>	<p>30%</p>

<b>MILESTONES</b>	<b>DELIVERABLES</b>	<b>Submission Date</b>	<b>% of contract amount</b>
<b>Post-survey Activities</b>  1. Deliver reports and maintain coordination with PCC staff	Printed and original signed documents duly received and accepted by the PCC, as follows: <ul style="list-style-type: none"> <li>• Narrative report to the PCC on the outcome of the survey including issues encountered throughout the project.</li> <li>• Hard copy and electronic form (in .pdf, .doc or .xlsx as applicable) of documents and other materials used in the survey (Transmittal evidencing the submission of the electronic form should also be submitted as proof of submission of the files, duly received by the PCC).</li> <li>• Written response to the PCC’s inquiries, as needed.</li> </ul>	<b>Within fifteen (15) calendar days from the PCC’s acceptance of the deliverables for data collection and processing</b>	40%
<b>TOTAL</b>	Completion of engagement within ninety (90) calendar days from the issuance of the Notice to Proceed		100%

The timeline for the survey shall begin when the service provider is notified by the PCC through a task order to be sent through an email or formal letter; while counting of the number of days elapsed shall begin strictly from the date of contract signing.

All printed documents to be submitted to the PCC should be properly and duly signed by the Project Manager or the highest officer/personnel in-charge of the project.

All payments shall be endorsed by the Director of the Economics Office. The issuance of a Certificate of Satisfactory Service Rendered for the deliverables for each tranche payment, and each tranche payment to the Consultant shall be released upon PCC’s review and acceptance of the deliverables above.

## **VII. QUALIFICATIONS OF THE CONTRACTOR AND ITS PERSONNEL**

The service provider should meet all the requirements set by the Government Procurement Reform Act (R.A. No. 9184) to be eligible to participate in the procurement.

The technical and financial proposals will be evaluated using the Quality Based Evaluation (QBE), pursuant to the pertinent provisions of R.A. No. 9184 or the Government Procurement Reform Act. The criteria for the evaluation of the proposals are:

Criteria	Minimum Qualifications	Bases	Weight (%)
Experience and capability of the service provider	<ul style="list-style-type: none"> <li>• At least three (3) years in business.</li> <li>• Engaged with at least three (3) companies/institutions in similar or relevant nature of work (i.e., preparation of survey instruments and sampling designs, provision of trainings for enumerators, data encoders, etc., conduct of survey, collection and analysis of data, and reporting of survey results)</li> <li>• Engaged with at least two (2) of which belonging to the public/government sector in similar or relevant nature of work as mentioned above</li> </ul>	<p>Records of previous engagement and quality of performance in projects related to competition and other similar fields, and geographical distribution of current/ impending projects.</p> <p>(a) DTI or SEC registration submitted indicating the year of registration and/or other relevant documents; (b) list of completed and on-going contracts; (c) copies of Certificates of Satisfactory Service Rendered / Certificates of Completion</p>	20%
Quality of personnel to be assigned to the project	<p><u>Project Manager</u></p> <ul style="list-style-type: none"> <li>• Graduate of in any relevant field of Social Science, Communications, and/or Statistics</li> <li>• At least seven (7) years of experience with socioeconomic household survey design and implementation</li> <li>• At least 24 hours of relevant training</li> </ul> <p><u>Statistical Service Executive</u></p> <ul style="list-style-type: none"> <li>• Graduate of B.S. Statistics or other allied courses</li> <li>• At least five (5) years of experience in statistical techniques and sampling design</li> <li>• At least 24 hours of relevant training</li> </ul> <p><u>Electronic Data Processing Manager</u></p> <ul style="list-style-type: none"> <li>• Graduate of any four (4)-year degree course</li> <li>• Two (2) years of experience in designing a system to input and</li> </ul>	<p>Original signed curriculum vitae submitted indicating relevant work experience and educational background, and trainings attended supported by certificates of attendance / participation</p> <p><i>Note: Pursuant to Section 33.3 of the revised IRR, there should be no replacement of key personnel before the awarding of the contract, except for justifiable reason, such as illness, death, or resignation provided it is duly supported by relevant certificates, or any delay caused by the procuring entity. Once the contract has been awarded, no replacement shall be allowed until after fifty percent (50%) of the personnel's man-months have been served, except for justifiable reasons, subject to appropriate sanctions as prescribed in the Philippine Bidding Documents (PBD).</i></p>	30%

Criteria	Minimum Qualifications	Bases	Weight (%)
	manage data and good command of Stata or R; <ul style="list-style-type: none"> <li>• With at least 24 hours of relevant training</li> </ul> <u>Field Manager</u> <ul style="list-style-type: none"> <li>• Graduate of any four (4)-year degree course</li> <li>• Two (2) years of experience in managing the conduct of surveys;</li> <li>• With at least 24 hours of relevant training</li> </ul>		
Plan of approach and methodology	<ul style="list-style-type: none"> <li>• The deliverables are for submission on the day of the schedule set by the PCC.</li> <li>• The proposed approach is discussed in full detail, and the methodology is specifically tailored to the characteristics of the assignment and flexible enough to allow its adaptation to change that may occur during project execution.</li> <li>• Sampling Design is doable and will generate acceptable results</li> <li>• Existing policies of the firm pertaining to quality control measures, refusal rate, minimum no. of callbacks and attrition rate, if any, were included in the proposal</li> </ul>	Based on the timelines, written proposal, overall quality of proposed work	40%
Overall work commitment	At most ten (10) ongoing projects (including awarded but not yet started contracts)	Originally signed records of on-going (including awarded but not yet started contracts) and previous engagements  <i>Note: Contract/s that will terminate on or before 90 calendar days, from the deadline of submission of eligibility documents for this project, shall not be considered as 'ongoing'.</i>	10%
<b>TOTAL</b>			100%

The bidder with the highest rated score based on the technical and financial proposals submitted, provided that the score passes the hurdle rate of 85 points, shall be the Highest Rated Bidder.

## **VIII. CONFIDENTIALITY OF DATA AND INFORMATION**

The service provider shall be engaged by the PCC and shall submit outputs directly to the designated project manager within PCC for review and endorsement for payment. All the materials, data and information used and generated through the survey will be the sole property of the PCC. The consultant shall not use nor disseminate these documents for their own research purposes without the written consent of the PCC.

## **IX. LIQUIDATED DAMAGES**

If the contractor fails to deliver any or all of the goods and/or to perform the services within the period specified in this contract, the Procuring Entity shall, without prejudice to its other remedies under this contract and under the applicable law, deduct from the contract price as liquidated damages, the applicable rate of one-tenth of one percent of the cost of the unperformed portion for every day of delay. The maximum deduction shall be ten percent of the amount of the contract. Once the maximum is reached, the procuring entity reserves the right to rescind the contract, without prejudice to other courses of action and remedies open to it.

## **X. DISPUTE RESOLUTION**

Should any dispute related to the TOR and/or rights of the parties arise, the same shall be submitted to mutual consultation, mediation and arbitration, in the order of application. The venue of the proceedings shall be in Quezon City.

In case of a court suit, the venue shall be the courts of competent jurisdiction in Quezon City, to the exclusion of all other courts; and

Any amendment or additional terms and conditions to the TOR must be in writing, signed and acknowledged by the Parties.

Approved by:

  
**BENJAMIN E. RADO, JR., PhD**  
Director IV, Economics Office

**CONFORME:**

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**Name and Signature of Authorized Representative**

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**Designation**

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**Name of Company**

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**Date**

**ANNEX A**  
**RATING CRITERIA FOR EVALUATION OF THE TECHNICAL PROPOSAL**

CRITERIA	PARAMETERS	RATING SYSTEM		WEIGHT (%)
<b>Experience and capability of the service provider (20%)</b>	Number of years in operations/existence	100	With more than three (3) years in operation as a survey firm	40%
		85	With three (3) years in operation as a survey firm	
		0	With less than three (3) years in business	
	Number of organizations engaged, as specified in the TOR	100	Engaged with more than three (3) organizations in similar or relevant nature of work (i.e., preparation of survey instruments and sampling designs, provision of trainings for enumerators, data encoders, etc., conduct of survey, collection and analysis of data, and reporting of survey results)	30%
		85	Engaged with three (3) organizations in similar or relevant nature of work (i.e., preparation of survey instruments and sampling designs, provision of trainings for enumerators, data encoders, etc., conduct of survey, collection and analysis of data, and reporting of survey results)	
		0	Engaged with less than three (3) organizations in similar or relevant nature of work (i.e., preparation of survey instruments and sampling designs, provision of trainings for enumerators, data encoders, etc., conduct of survey, collection and analysis of data, and reporting of survey results)	
	Number of government organizations engaged as specified in the TOR	100	Engaged with more than 5 organizations belonging to the public sector in similar or relevant nature of work as mentioned above	30%
		90	Engaged with 3 to 5 organizations belonging to the public sector in similar or relevant nature of work as mentioned above	
		85	Engaged with 2 organizations belonging to the public sector in similar or relevant nature of work as mentioned above	
		0	Engaged with less than two organizations belonging to the public sector in similar or relevant nature of work as mentioned above	

<b>Quality of personnel to be assigned to the project (30%)</b>	Educational attainment of the Project Manager	100	With PhD or Doctorate degree in any relevant field of Social Science and/or Statistics	20%
		90	With Master of Sciences/Arts degree in any relevant field of Social Science and/or Statistics	
		85	With Bachelor of Sciences/Arts degree in any relevant field of Social Science, and/or Statistics	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not from allied courses	
	Educational attainment of the Statistical Service Executive	100	With PhD or Doctorate degree in Statistics or other allied courses	15%
		90	With Master of Sciences/Arts degree in Statistics or other allied courses	
		85	With Bachelor of Sciences/Arts degree in Statistics or other allied courses	
		0	Educational attainment below a Bachelor of Sciences/Arts degree, or degree attained is not from allied courses	
	Educational attainment of the Electronic Data Processing Manager	100	With PhD or Doctorate degree	10%
		90	With Master of Sciences/Arts degree	
		85	With Bachelor of Sciences/Arts degree	
		0	Educational attainment below a Bachelor of Sciences/Arts degree	
	Educational attainment of the Field Manager	100	With PhD or Doctorate degree	10%
		90	With Master of Sciences/Arts degree	
		85	With Bachelor of Sciences/Arts degree	
		0	Educational attainment below a Bachelor of Sciences/Arts degree	
Years of experience of the Project Manager	100	With more than 10 years of experience in socioeconomic household survey design and implementation	10%	
	90	With 8-10 years of experience in socioeconomic household survey design and implementation		
	85	With 7 years of experience in socioeconomic household survey design and implementation		
	0	With less than 7 years of experience in socioeconomic household survey design and implementation		

	Years of experience of the Statistical Service Executive	100	With more than 8 years of experience in statistical techniques and sampling design	10%
		90	With 6-8 years of experience in statistical techniques and sampling design	
		85	With 5 years of experience in statistical techniques and sampling design	
		0	With less than 5 years of experience in statistical techniques and sampling design	
	Years of experience of the Electronic Data Processing Manager	100	With more than 5 years of experience in designing a system to input and manage data and good command of Stata or R	10%
		90	With 3-5 years of experience in designing a system to input and manage data and good command of Stata or R	
		85	With 2 years of experience in designing a system to input and manage data and good command of Stata or R	
		0	With less than 2 years of experience in designing a system to input and manage data and good command of Stata or R	
	Years of experience of the Field Manager	100	With more than 5 years of experience in managing the conduct of surveys	10%
		90	With 3-5 years of experience in managing the conduct of surveys	
		85	With 2 years of experience in managing the conduct of surveys	
		0	With less than 2 years of experience in managing the conduct of surveys	
	Number of hours of relevant training of all personnel	100	With more than 48 hours of relevant training	5%
		90	With 25-48 hours of relevant training	
		85	With 24 hours of relevant training	
		0	With less than 24 hours of relevant training	
<b>Plan of approach and methodology (40%)</b>	Timing of Deliverables	100	<b>Very Good</b> The timeline of deliverables allows for submission at least 5 days before the deadline set by the PCC.	20%
		90	<b>Good</b> The timeline of deliverables allows for submission 2-4 days before the deadline set by the PCC.	
		85	<b>Satisfactory</b> The timeline of deliverables allows for submission by the deadline set by the PCC.	

		0	<b>Poor</b> The timeline of deliverables allows for submission after the deadline set by the PCC.	
	Comprehensive Field Survey Plan	100	<b>Very Good</b> Characteristics under “good” are present with additional activities/ recommendations that add value to the project. Important issues are approached in an innovative and efficient way, indicating that the offeror has understood the main issues of the assignment and has outstanding knowledge of new solutions. The proposal details ways to improve the results and the quality of the assignment by using various approaches, methodologies, and knowledge.	30%
		90	<b>Good</b> The proposed approach is discussed in full detail, and the methodology is specifically tailored to the characteristics of the assignment and flexible enough to allow its adaptation to change that may occur during project execution.	
		85	<b>Satisfactory</b> All key activities are included in the activity plan, but they are not detailed. There are minor inconsistencies between timing, assignment outputs, and proposed approach.	
		0	<b>Poor</b> Most key activities are included in the activity plan, but they are not detailed. There are major inconsistencies between timing, assignment outputs, and proposed approach. Although the approach and methodology are suitable, they do not include a discussion on how the offeror proposes to deal with critical characteristics of the assignment.	
	Sampling Design	100	<b>Good</b> The sampling design submitted is compliant with the requirements in the Terms of Reference.	20%
		85	<b>Satisfactory</b> The sampling design submitted has some deviations from the requirements in the Terms of Reference, but the	

			survey can still be conducted with acceptable results.		
		0	<b>Poor</b> The sampling design is discussed broadly and is not tailored to the needs of the assignment. The survey cannot be conducted with acceptable results.		
	Quality Control	100	<b>Good</b> The service provider submits existing and exhaustive quality control measures to ensure the level of output.	20%	
		85	<b>Satisfactory</b> The service provider has existing and adequate quality control measures to ensure the level of output.		
		0	<b>Poor</b> The service provider does not submit any quality control measures or submits insufficient quality control measures to ensure the level of output.		
	Other Policies	100	<b>Good</b> The service provider submits existing and exhaustive policies pertaining to the following: refusal rate, minimum number of callbacks, and attrition rate, among others.	10%	
		85	<b>Satisfactory</b> The service provider has existing and adequate policies pertaining to the following: refusal rate, minimum number of callbacks, and attrition rate, among others.		
		0	<b>Poor</b> The service provider does not submit any policies, or submits insufficient policies pertaining to the following: refusal rate, minimum number of callbacks, and attrition rate, among others.		
	<b>Overall work commitment (10%)</b>	Number of ongoing projects	100	With less than with ten (10) ongoing projects (including awarded but not yet started contracts)	100%
			85	With ten (10) ongoing projects (including awarded but not yet started contracts)	
0			With more than with ten (10) ongoing projects (including awarded but not yet started contracts)		

## **Financial Proposal**

Rating =  $(LAP / AOP) \times \% \text{ Allocation}$

Where:

AOP = amount of offer in the financial proposal

LAP = lowest amount offered among offerors

% Allocation = percentage assigned to the financial proposal