

Terms of Reference (TOR) for Survey Methodologies

Post Title:	Survey methodologies Expert
Anticipated Starting Date:	ASAP
Anticipated Duration:	12 months
Location:	Riyadh, Saudi Arabia
Project:	100619 - Institutional Support to Statistics
National or International consultancy:	International Consultant

A. Office/Unit/Project Description

Saudi Arabia has realised and sustained, for the last four decades, remarkable progress along the socio-economic development path. As a result of this, the Kingdom has been able to move to a high-income country. The GDP, for instance, increased from SR 156 billion in 1969 to SR 2,631 billion in 2018, putting the economy among the top 20 global economies in terms of size. Based on the annual ranking of the Human Development Index (HDI) of the Human Development Report, Saudi Arabia has steadily moved from the medium human development category in the 1990s to the very high human development category in 2018 at 0.857 value of HDI.

The Saudi Vision 2030 represents an ambitious resolve with long-term goals and expectations founded on the strengths and capabilities of the Kingdom. It covers the three themes of a vibrant society, a thriving economy and an ambitious nation. A thorough review of the three themes and their underlying issues of national concern would reveal a holistic approach to development that encompasses the three dimensions of Sustainable Development Goals (SDGs): the social, the economic and the environmental. Saudi Arabia recognises that achieving the SDGs requires rigorous, real-time and continuous monitoring, for which quality statistics is a must. The General Authority for Statistics (GaStat) has gone through a major revision of its corporate strategy and vision in alignment with the Saudi Vision 2030 and the SDGs. The revised strategy revolves around five pillars:

- Usage of statistics and information
- Production of statistics and information
- Application of advanced technologies in collecting and analyzing datasets
- Communications and awareness towards statistical knowledge
- Governance of the statistical sector

Under the framework of the Institutional Support to Statistics project, UNDP provides technical support to the GaStat to strengthen the institutional and human capacities of the national statistical system to support evidence-based development planning and policy-making.

The overall objective is to help improve the processes, methods, tools, and capacity of the Methodologies department in GaStat. For this year, the following three priority areas have been identified to modernize the statistical system of GaStat: designing samples, calculating weights and fixing response rates. All of these areas will be implemented through the new frame (census 2022), and establishments register frame.

B. Scope of Work

This consultancy aims to review, update, and support the development of an integrated framework to develop a survey questionnaire/application and related guidance on survey implementation, with a focus on the official statistics to enable the GASTAT to produce globally-comparable statistics and to become a global reference in the field of survey design and methodologies.

In this context, The GASTAT/ survey design unit is seeking to recruit a survey methodologies expert to support the survey design work to be carried out by the unit. The survey methodologies expert will work on advance methodologies in terms of the design and piloting of survey methodologies, as well as on the compilation of guidance on data collection. The survey methodologies expert will provide technical assistance related to designing samples for different surveys, such as household expenditure, labor force, business statistics and consumer price index (CPI).

The expert will also implement capacity-strengthening activities, including training and mentoring, for the methodologies department staff. Specifically, the responsibilities under this assignment include the following:

I. Technical support:

- Improve households' surveys sampling design
- Transfer knowledge expertise in sampling weights for households' surveys
- Improve the establishment's surveys sampling design
- Transfer knowledge expertise in sampling weights for establishments surveys
- Improve agriculture surveys sampling design
- Transfer knowledge expertise in sampling weights for agriculture surveys
- Improve response analysis for households, establishments and agriculture surveys
- Transfer knowledge and expertise in deal with missing values
- Evaluate registered data frames
- Study census frames
- Evaluate current methodologies templates
- Evaluate the current GSBPM model (Design phase)
- Perform any other relevant tasks requested by the supervisor.

II. Capacity Development

- The expert will advise the survey unit team on the best practices in relation to methodologies, concepts and frameworks.
- Delivering training to the staff in designing, developing, and testing the survey
- Training national team to plan and implement the survey
- Providing coaching and on-the-job-training for the staff as needed

C. Expected Deliverables and Outputs

Deliverables	Breakdown with details	Expected number of working days	Approvals Required
Deliverable 1:	Improve households' surveys sampling design	21	Director of Survey Unit In collaboration with UNDP Programme Analyst
Deliverable 2:	Transfer knowledge expertise in sampling weights for households' surveys	21	
Deliverable 3:	Improve establishment's surveys sampling design	21	
Deliverable 4:	Transfer knowledge expertise in sampling weights for establishments surveys	21	
Deliverable 5:	Improve agriculture surveys sampling design	21	
Deliverable 6:	Transfer knowledge expertise in sampling weights for agriculture surveys	21	
Deliverable 7:	Improve response analysis for households, establishments and agriculture surveys	21	
Deliverable 8:	Transfer knowledge expertise in deal with missing values	21	
Deliverable 9:	Evaluate registered data frames	21	
Deliverable 10:	Study census frames	21	
Deliverable 11:	Evaluate current methodologies templates	21	
Deliverable 12:	Evaluate the current GSBPM model (Design phase)	21	
Total of Working Days		252 working days	

D. Institutional Arrangement

- The expert will be reporting to the Director of the Survey Unit at GASTAT. As well as, keeping UNDP assigned Programme Analyst informed about the monthly progress report.

E. Duration of the Work

- The expected duration of the assignment is expected to be up to 12 months with the possibility of extension.

F. Duty Station

- The assignment will be In Country Riyadh, Saudi Arabia. He/ She will be embedded within the within the Survey Unit at GASTAT.
- If unforeseen travel outside the consultant's home-based city is requested by UNDP and not required by the Terms of References (ToR), such travel shall be covered by UNDP in line with applicable rules and

regulations and upon prior written agreement. In such cases, the consultant shall receive living allowances not exceeding the United Nations (UN) Daily Subsistence Allowance (DSA) rate for such other location(s).

- **Note:** A written approval from UNDP and relevant authorities will be required to facilitate the consultant's travel to any locations than stated on this TOR on official missions where necessary.

Working Arrangements:

- ✓ All mission travels must be approved in advance and in writing by the Supervisor.
- ✓ United Nations Development of Safe and Security – BSAFE course must be successfully completed prior to the commencement of travel.
- ✓ The Consultant is responsible for ensuring they have vaccinations/inoculations when travelling to certain countries, as designated by the UN Medical Director.
- ✓ The consultant is also required to comply with the UN security directives.
- ✓ The consultant is responsible for obtaining any visas needed in connection with travel with the necessary support from UNDP.
- ✓ The consultant will be responsible for submitting his/her own mission travel arrangements in line with UNDP travel policies.
- ✓ The consultant is responsible for required health and life insurance related to work or travel.
- ✓ The consultant is expected to have his/her own Laptop/Computer.

G. Qualifications

i. Min. Academic Education

- ✓ Master's Degree in statistics or economics with an emphasis on survey methodologies or any other relevant fields

ii. Min. years of relevant Work experience

- ✓ At least 12 years of relevant professional experience with national statistics offices, international organisation, or government in applying statistical theories and techniques
- ✓ Knowledge of available survey methodologies, especially at regional and international levels
- ✓ Certification of Training courses/workshops related to the field of statistical methodologies.
- ✓ Previous experience with ESCWA, and/or UN agencies or similar entities
- ✓ Previous experience with NSO (regional and/or GCC)
- ✓ Full understanding of methodologies and concepts of official stats surveys
- ✓ Experience of / Survey solutions / Blaise/CSPRO
- ✓ The ability to design, test, and implement surveys.
- ✓ Ability to provide statistical technical advice
- ✓ Ability to work on any of the statistical packages to analyse data.
- ✓ Knowledge & experience in working with constituents in the Arab States, particularly in the Gulf Cooperation Council (GCC).
- ✓ Good understanding and practice of capacity development.

Competencies

- ✓ Excellent analytical, communication, writing and editorial skills
- ✓ Ability to work on own initiative as well as a member of a team and to work under pressure.
- ✓ Knowledge & experience of working with constituents in the Arab States, particularly in the Gulf Cooperation Council (GCC).

- ✓ Demonstrates integrity and fairness by modelling UN values and ethical standards.
- ✓ Demonstrates professional competence and is conscientious and efficient in meeting commitments, observing deadlines and achieving results.
- ✓ Display cultural, gender, religion and age sensitivity and adaptability.
- ✓ Excellent interpersonal skills.
- ✓ Good understanding and practice of capacity development.

Required Language(s)

- ✓ Excellent written, verbal, and interpersonal communication skills in the Arabic and English language.

H. Scope of Price Proposal and Schedule of Payments:

All proposals must be expressed in a lump sum amount. This amount must be “all-inclusive”. Please note that the terms “all-inclusive” implies that all costs (professional fees, living allowances, communications, consumables, etc.) that could possibly be incurred are already factored into the final amounts submitted in the proposal.

Payments shall be made to the individual contractor upon successful completion and certification by UNDP that services have been satisfactorily performed, based upon the actual number of working days and accomplishments of each deliverable.

Payment shall be made as a deliverables-based lump upon the receipt of the deliverables and certification of satisfactory performance by UNDP.

The Expert will share a Certificate of Payment (CoP) where he/he needs to indicate achieved outputs. Then the certificate of payment must be verified by the UNDP Team and certified by UNDP top management. The Expert is advised to keep a detailed timesheet of the days worked and tasks performed throughout the consultancy assignment. A bi-weekly update of the timesheet will be requested, and such documentation will support the payment process as deemed needful.

Technical Criteria for Evaluation (Maximum 70 points)

Only candidates obtaining a minimum of 70% of the points would be considered for the Financial Evaluation

Payment	Phases	Estimated Duration to Complete	Payment Percentage
1 st payment	Upon Accomplished and Submission of Deliverable 1 (100%)	1 month after the signature of the contract	8.3%
2 nd payment	Upon Accomplished and Submission of Deliverable 2 (100%)	2 months after the signature of the contract	8.3%
3 rd payment	Upon Accomplished and Submission of Deliverable 3 (100%)	3 months after the signature of the contract	8.3%
4 th payment	Upon Accomplished and Submission of Deliverable 4 (100%)	4 months after the signature of the contract	8.3%

Payment	Phases	Estimated Duration to Complete	Payment Percentage
5 th payment	Upon Accomplished and Submission of Deliverable 5 (100%)	5 months after the signature of the contract	8.3%
6 th payment	Upon Accomplished and Submission of Deliverable 6 (100%)	6 months after the signature of the contract	8.3%
7 th payment	Upon Accomplished and Submission of Deliverable 7 (100%)	7 months after the signature of the contract	8.3%
8 th payment	Upon Accomplished and Submission of Deliverable 8 (100%)	8 months after the signature of the contract	8.3%
9 th payment	Upon Accomplished and Submission of Deliverable 9 (100%)	9 months after the signature of the contract	8.3%
10 th payment	Upon Accomplished and Submission of Deliverable 10 (100%)	10 months after the signature of the contract	8.3%
11 th payment	Upon Accomplished and Submission of Deliverable 11 (100%)	11 months after the signature of the contract	8.3%
Final payment	Upon Accomplished and Submission of Deliverable 12 (100%)	12 months after the signature of the contract	8.7%

I. Recommended Presentation of Offer

For purposes of generating Offers whose contents are uniformly presented and to facilitate their comparative analysis, it is best to recommend the preferred contents and presentation of the offer to be submitted, as well as the format/sequencing of their presentation. The following documents may be requested:

- 1) Duly accomplished **Letter of Confirmation of Interest and Availability** using the template provided by UNDP;
- 2) **Personal CV or P11**, indicating all past experience from similar projects, as well as the contact details (email and telephone number) of the candidate and at least three (3) professional references.
- 3) **Financial Proposal** that indicates the all-inclusive fixed total contract price, supported by a breakdown of costs, as per the template provided. If an Offeror is employed by an organization/company/institution, and he/she expects his/her employer to charge a management fee in the process of releasing him/her to UNDP under a Reimbursable Loan Agreement (RLA), the Offeror must indicate at this point and ensure that all such costs are duly incorporated in the financial proposal submitted to UNDP.

J. Criteria for Selection of the Best Offer

Applicants are shortlisted based on the Required Skills and Experience stated in the TOR.

The selection of the best offer from the shortlisted candidates will be based on a Combined Scoring method – where the qualifications and methodology will be weighted a max. of 70% and combined with the price offer, which will be weighted a max of 30%.

Individual consultants will be evaluated based on the following methodology:

Step I: Screening and Desk Review

Technical Criteria (**CV review and Desk Review/Interview optional**) – maximum 70 points. Only candidates who obtained at least 70% of points from the CV desk review (who will score at least 49 points) will be considered for the next evaluation stage, i.e., financial evaluation.

Applications will be first screened, and only candidates meeting the following minimum criteria will progress to the pool for shortlisting:

Technical Evaluation (70 Points, 70% weight)

Requirements	Criteria	Max 70 points
Min. Academic Education	<ul style="list-style-type: none"> Master’s Degree in statistics or economics with an emphasis on survey methodologies or other related field 	15
Relevant professional experience	<ul style="list-style-type: none"> At least 12 years of relevant professional experience with national statistics offices, international organizations, or government in applying statistical theories and techniques 	20
	<ul style="list-style-type: none"> Certification of Training courses/workshops related to the field of statistical methodologies. 	10
Work experience in similar contexts	<ul style="list-style-type: none"> Knowledge of available survey methodologies, especially at regional and international levels Full understanding of methodologies and concepts of official stats surveys Proven experience in / Survey solutions / Blaise/CSPRO Proven ability to design, test, and implement surveys. Proven provision of statistical technical advice Proven working experience on any of the statistical packages to analyse data. 	10
	<ul style="list-style-type: none"> Knowledge & experience in working with constituents in the Arab States, particularly in the Gulf Cooperation Council (GCC). Experience with ESCWA and/or UN agencies or similar international entities Experience with NSO (regional and/or GCC) 	10
Language(s)	<ul style="list-style-type: none"> English (3 pts) Arabic (2 pts) 	5

Only candidates obtaining a minimum of 49 points (70% of the total technical points) would be considered for the Financial Evaluation.

Weight Per Technical Competence	
5 (outstanding): 96% - 100%	The individual consultant/contractor has demonstrated an OUTSTANDING capacity for the analyzed competence.
4 (Very good): 86% - 95%	The individual consultant/contractor has demonstrated a VERY GOOD capacity for the analyzed competence.
3 (Good): 76% - 85%	The individual consultant/contractor has demonstrated a GOOD capacity for the analyzed competence.
2 (Satisfactory): 70% - 75%	The individual consultant/contractor has demonstrated a SATISFACTORY capacity for the analyzed competence.
1 (Weak): Below 70%	The individual consultant/contractor has demonstrated a WEAK capacity for the analyzed competence.

Step II: Financial Assessment:

Financial Proposal – Maximum 30 points

- Duly accomplished Confirmation of Interest and Submission of Financial Proposal Template using the template provided by UNDP (Annex II)

PRICE PROPOSAL AND SCHEDULE OF PAYMENTS

The contractor shall submit a price proposal as below:

The total professional fee shall be converted into a lump-sum contract and payments under the contract shall be made on submission and acceptance of deliverables under the contract in accordance with the schedule of payment linked with deliverables. The financial Proposal should include all relevant costs (consultancy fees, all envisaged travel costs, living allowances, etc.).

UNDP applies the “Best value for money approach” – the final selection will be based on the combination of the applicants’ qualifications and financial proposal.

K. The following documents shall be required from the applicants:

- Personal CV or P11**, indicating all past positions held and their main underlying functions, their durations (month/year), the qualifications, as well as the contact details (email and telephone number) of the Candidate, and at least three (3) the most recent professional references of previous supervisors. References may also include peers.
- A cover letter (maximum length: 1 page) indicating why the candidate considers him-/herself to be suitable for the position.
- The Professional Certificates mentioned above, as applicable.