



REQUEST FOR PROPOSAL

1. The Philippine Institute for Development Studies (PIDS) invites all eligible individual consultants to submit proposals for the **Consulting Service: Survey Data Digitalization and Technical Support for Development of Integrated Service Delivery / Public Health Programs Monitoring and Evaluation Framework and Application of Analysis in Relevant Quantitative Data (Sentinel Sites Project)**.
2. The Approved Budget for the Contract (ABC) is **Php320,000**.
3. Interested consultants must submit the following documents using PIDS the prescribed forms:
 - a) Curriculum Vitae of the proposed Consultant(s)¹
 - b) Technical Proposal Form¹
 - c) Financial Proposal Form¹
 - d) Filled out Data Privacy Notice and Personal Data Protection Form¹
 - e) Statement of Completed contracts²
 - f) Statement of All Ongoing and Awarded But Not Yet Started Contracts²
 - g) Notarized Omnibus Sworn Statement (for ABC above Php50,000.00)¹
 - h) Income/Business Tax Returns (for ABC above Php500,000.00)¹
 - i) PhilGEPS Registration Number (certificate or screenshot)¹
 - j) Valid Mayor's/Business Permit (Firm) or BIR Certificate of Registration³ (Individual).
4. Interested consultants may obtain further information from the Procurement Management Division at telephone via email at procurement@pids.gov.ph.
5. The Institute shall adopt the Quality-Based Evaluation procedure in selecting consultants based on the attached Terms of Reference.
6. The deadline for submission of proposals is on **16 July 2024 (5:00 PM)** addressed to:

The BAC Chairperson for Consultancy
Services c/o The BAC Secretariat
Procurement Management Division
18/F Three Cyberpod Centris – North Tower, EDSA cor. Quezon Ave., Quezon City

Proposals may also be submitted through email at procurement@pids.gov.ph.

7. PIDS reserves the right to reject any or all of the proposals, declare a failure of bidding, or not award the contract if there is evidence of collusion, including any act that restricts, suppresses, or nullifies competition, or if there is a failure to follow the prescribed bidding procedures. PIDS also reserves the right to waive any required formality in the proposals received and select the proposal it determines most advantageous to PIDS.


DR. VALERIE GILBERT T. ULEP
Chairperson
PIDS-BAC for Consultancy Services

Reference No.:2024-224

¹Applicable for individual consultants and firms

²Applicable for firms only

³Individual consultants must issue Official Receipt (OR) during payment.

Philippine Institute for Development Studies

TERMS OF REFERENCE

Consulting Service: Survey Data Digitalization and Technical Support
for
Development of Integrated Service Delivery / Public Health Programs Monitoring and
Evaluation Framework and Application of Analysis in Relevant Quantitative Data
(Sentinel Sites Project)

1. Background and Rationale

Universal Health Coverage (UHC) is a global goal to ensure everyone can access essential health services without financial hardship. In the Philippines, UHC has been a significant priority of the government as the country continues to grapple with the challenges of providing healthcare to its growing population. While the UHC Act contains a gamut of health reforms, one of the path-breaking provisions of the law is the shift in provider payment or how the country's purchaser pays healthcare providers for their services. The Act mandates PhilHealth to adopt Disease Related Group (DRG) and capitation in paying for inpatient and outpatient care services, respectively. Diagnosis Related Group (DRG) classifies inpatient hospital cases based on similar clinical characteristics and resource utilization. DRG-based payment reform is one of the most used systems to reimburse hospitals for their services based on these classifications. In theory, DRG-based payment and capitation could manage expenditure growth and improve healthcare efficiency, quality, and equity. It is essential to carefully monitor and evaluate the impact of any provider payment reforms to ensure that they do not inadvertently result in more inefficiencies and inequities.

In 2021, PIDS conducted a study that aimed to measure whether Philippine hospitals have the necessary foundational structures and inputs in place to provide high quality health care services. Results of this study may point out gaps or opportunities for improvement to health providers, provide a baseline on the service capability and readiness of hospitals, and give insight to DOH and PhilHealth on how to improve their continuous quality improvement programs for health facilities. Due to limited time and resources, not all the hospitals were able to submit hospital profile and quality data. In 2023, the collection and analysis of the remaining hospital profile and quality data will be resumed to update the current analyses on the service capability of hospitals to provide high quality health care.

These studies operationalize on evaluating the service capability and readiness of hospitals, provider payment reforms, and outpatient health insurance (i.e., KONSULTA+ or the Comprehensive Outpatient Benefit Package) expansion under

the UHC Act (2019). The Department of Health (DOH) and PhilHealth plan to pilot DRGs implementation and outpatient benefit package (which uses a capitation payment system) in select provinces in the country under the CATCH Program. Hence, assessing whether these provider payment reforms will impact health sector goals (i.e., improve efficiency, quality, and equity of healthcare services), at least in pilot sites, is critical. The evaluation will be the basis for expanding provider payment reforms nationwide.

These studies will allow the DOH and PhilHealth to rigorously evaluate provider payment reforms and health insurance (e.g., KONSULTA+ or COBP) expansion under the UHC Act as well as to determine the service capability and readiness of Philippine hospitals to provide for general health services. These studies propose a robust evaluation framework by collecting information before and after/during the implementation. The DOH will pilot the intervention in four (4) provinces, and baseline indicators in (4) comparator provinces will also be collected, allowing researchers to conduct rigorous impact evaluation with counterfactuals.

The impact evaluation results will inform policy makers and other stakeholders if the program affects its target outcomes among its beneficiaries. The policy recommendations generated by the evaluation can present useful opportunities for the implementers to improve the program implementation.

This consultancy covers the digitalization of the survey tools, which includes a nationwide survey of households, healthcare providers, and healthcare facilities, for the study of the UHC Provider Payment Reforms In 2023 COBP and CATCH Project: Baseline Assessment of the Implementation of Provider Payment and Outpatient Benefit Reforms in the Philippines and PIDS-DOH Sentinel Sites Project Component Study: Continuing Analysis of Hospital Profile, Financial, and Quality Data.

2. Objectives of the Study

The general objectives of these studies are to evaluate whether Philippine hospitals have the necessary structures and inputs that facilitate high quality health care services, to describe the service capability and readiness of Philippine hospitals to provide general health services, and to conduct a baseline assessment of the local health system in the eight (8) CATCH pilot sites (control and intervention provinces).

3. Objectives of the Consultancy

This consultancy aims to engage a consultant who will digitalize the survey tools for the study of the PIDS-DOH Sentinel Sites Project Component Study: Continuing Analysis of Hospital Profile, Financial, and Quality Data and UHC Provider Payment Reforms In 2023 COBP and CATCH Project: Baseline Assessment of the Implementation of Provider Payment and Outpatient Benefit Reforms in the Philippines which involves a nationwide survey of households, healthcare providers, and healthcare facilities.

This will involve converting the current traditional paper-based surveys into a digital format. Below are the key components of the said surveys:

- **Survey of households.** The primary data collection in the survey will involve face-to-face interviews with eligible respondents (head of the household) from sampled households.
- **Survey of healthcare providers.** A survey of healthcare providers (HCPs) in the health facilities in the selected study sites are also included. The survey will collect information regarding the HCPs knowledge, compensation, effort and motivation, quality of care, continuity of care, and coordination and referral pathways. The data collection for this component will be simultaneously conducted with the household and health facility surveys.
- **Survey of health facilities.** Barangay Health Stations (BHS), Rural Health Units (RHUs), hospitals, infirmaries, and birthing homes in the study sites will also be surveyed. The survey will collect information on the characteristics of the health facility, affordability of services, access and quality of services, resources, and staffing among others. The survey will include collection of pertinent financial statements and other financial data as relevant to each health facility.

The list of questionnaires and corresponding target respondent per questionnaire and section are shown below:

Instrument	Target respondent
Population Survey	Household head or responsible adult
Health Facility Survey	Head of the health facility or designated person, or representative
Health Facility Records Review	Head of health facility or designated person for accounting and hospital statistics
Healthcare Provider Survey and Clinical Vignettes	Selected healthcare providers in the selected facilities

The survey will collect data from eight (8) study sites identified by DOH and PhilHealth: Benguet, La Union, Laguna, Batangas, Aklan, Iloilo, Sarangani, and Davao de Oro.

4. Scope of Work, Deliverables, and Schedule of Payment Releases

Under the guidance and technical oversight of a PIDS Research Fellow who serves as Project Director, the **Consultant** is expected to work with the Project Team and undertake the following tasks/activities¹:

¹ | If the consultant needs to undertake physical/face-to-face interviews and data collection and related activities, the consultant has to ensure compliance with existing and future policies, rules, and resolutions as may be issued by concerned government agencies pertaining to health and safety.

4.1 Inception phase

The Consultant will submit an inception report which will lay out the following:

- Review and refinement of tools for consideration by the Project Team, to check for potential issues with adoption to the Computer-Assisted Personal Interviews (CAPI) version.
- Plan for optimal user experience and data quality control
- Plan for survey software configuration
- Plan for data security and privacy measures
- Expected duration of survey digitalization
- Plan for general work and training for adoption of the digital format by the survey firm
- Research and evaluate different survey platforms or software options based on project requirements and budget.
- Select a suitable platform and configure it according to the survey design specifications.
- Schedule of deliverables

4.2 Survey Preparation and Design

- a. Continued review of the survey questionnaires to check for potential issues with adoption to the Computer-Assisted Personal Interviews (CAPI) version.
- b. Refine/enhance the enumerator's manual based on the final EDC questionnaires and guidance from the PIDS project team.
- c. Attend meetings with Project Director/Team as needed.

4.3 Digital Survey Development

- a. Convert the survey instruments provided by PIDS into Electronic Data Capture (EDC) forms in tablets/mobile devices or online platform, with the appropriate sequence and skip patterns.
 - Customize survey settings, branding, and permissions as needed within the chosen platform.
 - Identify any additional features or integrations required to enhance the survey functionality (e.g., custom scoring, third-party integrations).
 - Develop or configure custom features within the survey platform, ensuring compatibility and seamless integration.
 - Place data quality controls in the CAPI (e.g. data validation rules, limits, etc.)
- b. Ensure compliance with data protection regulations ((e.g Data Privacy Act (DPA) of 2012)) and organizational policies:

- Implement physical, technical and organizational measures regarding data collection, storage, and processing in accordance with the DPA of 2012.
 - Implement security measures such as encryption, access controls, and data anonymization to protect respondent confidentiality.
 - Map an organizational structure for data permissions.
- c. The Consultant will be expected to work in close coordination with the PIDS project team, which will also supervise survey implementation in the field.

4.4 Testing of the Digital Survey Tools

- a. Conduct comprehensive testing of the digital survey to identify any technical glitches, errors, or inconsistencies and address any issues related to survey functionality, navigation, or display across different devices and browsers.
- Test the functionality of all survey features, including question types, logic, and response options.
 - Evaluate the usability of the survey interface and navigation flow for respondents.
 - Verify compatibility across various devices (e.g., desktops, smartphones, tablets) and web browsers to ensure a consistent user experience.
 - Gather feedback from usability testing to identify areas for improvement in the survey design and user experience.
 - Collaborate with the technical team to implement enhancements and refinements based on user feedback
 - Iterate on the survey design and functionality as needed to optimize the overall user experience.
 - Test the online and offline functionality of the EDC forms
 - Test the functionality of the file server(s) where the data will be uploaded and will be used by the survey firm for actual implementation.

4.5 Training for adoption of digital format by the survey firm

- a. Make a comprehensive training plan for adoption of the digital survey:
- Develop training materials and resources to educate survey creators and administrators on how to use the digital survey platform effectively
 - Conduct training sessions or workshops to familiarize survey firm staff with the features, functionality, and best practices for administering digital surveys
 - Provide ongoing support and assistance to address any questions or issues that arise during the transition to the digital format
 - Identify risks related to the data collection and provide strategies on how to ensure data quality

4.6 Data Collection

- a. Implement correction and update the EDC form as needed
- b. Provide technical support during the data collection as needed
- c. Submit reports on the technical assistance rendered during data collection to the PIDS project team.

4.7 Turnover of software and data

- a. Provide PIDS with a project final report containing (1) a documentation/narrative of the procedures for using the digital platform and accessing survey data as well as issues encountered, including specific events during the survey that may have affected the quality of the data generated; (2) actual protocol for data entry and quality control measures implemented; and (3) identified gaps and relevant recommendations based on collected data, if any.
- b. Provide PIDS with a set of encrypted electronic files to transfer ownership of the digital survey tools and it shall be directly transmitted via a secure link with complex password to the Information and Communications Technology Services Division of PIDS in coordination with the Research Program Management Division of PIDS². Ensure all necessary backups and data archives are in place to safeguard against data loss or system failures.
- c. Conduct a final review and handover process to confirm that all deliverables have been completed satisfactorily and the digital survey is ready for use. As part of the final deliverables under this contract, provide a certification that all data gathered for the study has been turned over to PIDS and that the consultant did not retain copies of the datasets obtained during testing and lodged on the firm's file server; and that it will allow PIDS to verify if the data is complete.

5. Deliverable and Schedule of Payment

The Consultant will prepare the following outputs based on the schedule below:

Activities and Deliverables ³		Due dates	Payment tranches
Inception Report	▪ Workplan for survey digitization (include plans for	1 week after NTP	10%

² . The secure link containing the encrypted raw and anonymized datasets must be sent directly to the Information and Communications Technology Services Division (ICTSD) of the Research Services Department in a separate email, along with the link's password. ICTSD will save the file to the file server and be responsible for providing access to the study team members.

³ For applicable outputs, the draft and final reports submitted by the consultants should be aligned with the following guidelines: PIDS' Guide in the Preparation of Manuscript for Publication and General Guidelines in Preparing and Formatting a PIDS Discussion Paper, Guidelines in the preparation of Policy Notes.

	<p>optimal user experience, data quality control, data security, and privacy measures)</p> <ul style="list-style-type: none"> ▪ General work and training plan for adoption of the digital format by the survey firm ▪ Schedule of deliverables 	(Notice to Proceed)	
Digital Survey Tools	<ul style="list-style-type: none"> ▪ Final survey instruments with relevant local language translation for the study sites converted to Electronic Data Capture (EDC) forms Results of testing of the digital survey tools ▪ Successful integration of the developed EDC into tablets/mobile devices or online platform 	August 23, 2024	40%
Training Plan	<ul style="list-style-type: none"> ▪ Comprehensive training plan for adoption of the digital survey 	August 30, 2024	20%
Progress Report 1	<ul style="list-style-type: none"> ▪ Report on the technical assistance rendered during data collection 	October 25, 2024	10%
Progress Report 2	<ul style="list-style-type: none"> ▪ Report on the technical assistance rendered during data collection 	November 22, 2024	10%
Final Report	<ul style="list-style-type: none"> ▪ Final Report containing (1) a documentation/narrative of the procedures for using the digital platform and accessing survey data as well as issues encountered, including specific events during the survey that may have affected the quality of the data generated; (2) actual protocol for data entry and quality control measures implemented; (3) identified gaps and relevant recommendations based on collected data, if any.; and (4) revised version of the CAPI program, if any. 	November 30, 2024	10%
Terminal Report	<ul style="list-style-type: none"> ▪ Full set of original documents used in the study (if any) 		

<p>Turnover of data and information and certification of turnover and deletion of information</p>	<ul style="list-style-type: none"> ▪ Terminal Report containing Summary of Accomplishments and Activities conducted and List of Issues and Challenges Encountered ▪ Turnover to PIDS of all privileged, propriety, or confidential information, raw data containing personal and sensitive personal information, including copies in all forms of storage regarding said information; destroy and not retain such information ▪ Certification indicating the turnover of abovementioned information as well as the deletion of such information and that it will allow PIDS to verify if the data is complete. 		
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NOTE: Payments will be based on the acceptance and approval by PIDS of the corresponding outputs.

6. Qualifications of the Consultant

The Consultant should have the following qualifications:

- a) A Bachelor’s degree in Computer Science, Information Technology, or other related fields.
- b) At least 2 years of professional or research experience in survey creation and digitalization.
- c) Proficiency in basic programming languages used for web development (e.g. HTML, CSS, JavaScript, Python, or others).
- d) Proficiency in use of survey software and tools such as SurveyCTO, SurveyMonkey, Qualtrics, Google Forms, LimeSurvey, etc.
- e) Advanced skills in user interface design principles, data visualization, and data quality assurance

7. Project Duration

The engagement will commence upon signing of the contract until November 30, 2024, on a part-time basis. The Consultant’s work must be completed by within this period, and no man days will be chargeable after this date.

8. Approved Budget for the Contract

The approved budget for this consulting service is up to Php 320,000, depending on the qualifications. This amount does not include travel and accommodation during fieldwork. PIDS will shoulder the cost of fieldwork. PIDS shall not cover

hospitalization and other COVID-related health expenses of the consultant as no employer-employee relationship shall exist between the PIDS and the Consultant.

8. Evaluation Criteria

a. Evaluation Criteria:

Consultants will be evaluated based on the following criteria:

Criteria	Weight
Consultant's Qualifications <ul style="list-style-type: none"> ▪ A research or related institution having the following qualifications: <ul style="list-style-type: none"> a. A Bachelor's degree in Computer Science, Information Technology, or other related fields. b. At least 2 years of professional or research experience in survey creation and digitalization. c. Proficiency in programming languages used for web development (e.g. HTML, CSS, JavaScript, Python, or others). d. Proficiency in use of survey software and tools such as SurveyCTO, SurveyMonkey, Qualtrics, Google Forms, LimeSurvey, etc. e. Advanced skills in user interface design principles, data visualization, and data quality assurance 	50%
Plan of approach and methodology: <ul style="list-style-type: none"> a. Clarity, feasibility, innovativeness, and comprehensiveness of the approach b. Incisive interpretation of problems and suggested solutions 	50%
Total	100%

b. Detailed rating sheet (see attached file)

Prepared by: 
Dr. Valerie Gilbert T. Ulep
Project Director

Reviewed by: 
Ms. Christine Ruth P. Salazar
Division Chief II - RPMD (Research Project Management Division)
Digitally signed by Ajayi Renee


Approved by: **Ms. Renee Ann Jolina C. Ajayi**
Department Manager III, Research Services
Date: 2024.07.09 12:08:43