



REQUEST FOR PROPOSAL

1. The Philippine Institute for Development Studies (PIDS) invites all eligible individual consultants to submit proposals for the **Statistician for Tracer Study of 4Ps Beneficiaries**.
2. The Approved Budget for the Contract (ABC) is **PhP482,000**.
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 **18 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.:2024-229

¹Applicable for individual consultants and firms

²Applicable for firms only

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

Philippine Institute for Development Studies
TERMS OF REFERENCE

Statistician
for
Tracer Study of 4Ps Beneficiaries

1. Background and Rationale

The Pantawid Pamilyang Pilipino Program (4Ps) has established itself as a prominent component of the Philippine government's anti-poverty strategy. Launched in 2008, the program provides cash transfers to poor households if they comply with specific health and education requirements for their children. To assess the program's effectiveness and inform policy decisions, the program has undergone three rounds of rigorous impact evaluations, with a fourth study currently underway.

While past evaluations have yielded positive impacts on education, health, and even certain socio-behavioral outcomes, there were also some inconsistencies observed. Specifically, mixed findings have been noted concerning certain health indicators, such as stunting, and labor market involvement, and availment of specific health services. Moreover, the evaluations conducted so far have primarily focused on short-term and medium-term outcomes, leaving a gap in our understanding of how the 4Ps influence the long-term lives of beneficiaries and future generations.

This knowledge gap is crucial. While global research on Conditional Cash Transfer (CCT) programs like the 4Ps reports positive long-term outcomes in areas like education and health, mixed results have also been documented, particularly regarding cognitive skills and intergenerational impact on income and employment. Therefore, it is important for policy research to address the longstanding central policy question of the 4Ps' long-term and intergenerational impact. Likewise, it is also crucial to understand whether the positive short-term and medium-term impacts observed in past evaluations are sustained among beneficiaries after they exit the program and whether these benefits translate to improved life chances for the next generation.

This research offers a critical opportunity to delve deeper into this policy question and provide valuable insights to guide future program development. Specifically, this study traces older cohort of 4Ps beneficiaries to examine long-term impact of the program and assess the well-being of the original and second-generation households, by tracking their educational attainment, employment opportunities, and overall socio-economic status. Additionally, the study aims to understand whether the program's benefits translate into sustained positive outcomes beyond the program cycle.

To support the study, a consultant will be engaged to provide technical expertise in the research. Their responsibilities will include developing the data collection sampling strategy and providing input in the analysis. This Terms of Reference (TOR) describes

the requirements of the consultancy. The objectives and design of the study are discussed briefly in the succeeding items for context.

2. Objectives of the Study

The study aims to reassess the impact of the Pantawid Pamilyang Pilipino Program on short term, intermediate, and long- term outcomes. Specifically, it aims to:

- a. assess long-term impact on now-adult children (and their children, if any) on select outcomes;
- b. determine whether short-term and medium-term impact are sustained in beneficiaries; and
- c. identify pathways of impact in case studies of select households.

3. Objectives of the Consultancy

The consultancy aims to provide technical expertise in sampling and survey methodology to support the tracer study. In this regard, the consultant shall undertake the following:

- a. Develop a sampling strategy for the tracer study that allows tiered implementation of questionnaires;
- b. Conduct power calculations for estimation of core outcome indicators;
- c. Calculate sampling weights, as needed;
- d. Provide inputs in the data analysis in relation to the sampling strategy and survey implementation; and
- e. Write a report that summarizes the outputs of the consultancy and comments on the analysis and research as inputs to the overall study report¹.

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

Under the guidance and technical oversight of a PIDS Research Fellow who serves as the Project Director, the Consultant² is expected to work with the Project Team and undertake the following tasks/activities³

a. Submit an Inception Report

The Consultant shall submit an Inception Report following the PIDS template. The report shall include a description of the consultant's method/approach to the consultancy, the schedule of activities, and other sections required in the PIDS template.

¹ The final report is the PIDS Discussion Paper.

² The consultant may be an individual or a firm.

³ 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.

b. Develop a Rigorous Sampling Strategy

The Consultant shall design a multi-tiered sampling framework for the tracer study. The sampling strategy should optimize data collection efficiency while ensuring representativeness of the target population. This strategy should also allow for tailored questionnaires at each tier.

c. Power Calculations for Key Outcomes

The Consultant shall conduct power analyses to determine the minimum sample size needed for reliable estimation of the core outcome indicators for the tracer study. The outcome indicators will be identified by the PIDS project team. The power calculations will be included in the draft sampling strategy and will be the basis for the optimal sample sizes.

d. Sampling Weights (if applicable)

If necessitated by the sampling strategy, the Consultant shall calculate sampling weights. If the consultant recommends no sampling weights, a justification/explanation should be provided.

e. Data Analysis Guidance

The Consultant shall provide technical advice and guidance on data analysis particularly regarding aspects related to the sampling strategy and survey implementation.

f. Final Technical Report⁴

The Consultant shall submit a final technical report summarizing the consultancy's activities and outputs. This report should include:

- The detailed final sampling strategy.
- Documentation of the power calculations and their rationale.
- Explanation of any sampling weights applied, if any.
- Insights and recommendations regarding data analysis based on the sampling approach.

g. Terminal Report

⁴ For research outputs that will be released as a PIDS Discussion Paper (DP), the consultant shall prioritize the publication outlets of PIDS, particularly the peer-reviewed Philippine Journal of Development (PJD) and Research Paper Series (RPS). If the DP is not selected by PIDS Management for publication either as a PJD article or an RPS issue, the consultant may identify other dissemination outlets outside of PIDS. Guidelines for Authorship in PIDS Research Projects shall apply.

In addition to the final technical report, the Consultant shall submit a terminal report following the PIDS template. The Terminal report will summarize the accomplishments and project implementation issues/challenges.

h. Turnover of Materials and Certification

At the end of the consultancy, the Consultant shall turn over all data and other materials provided to him by PIDS as part of the project. The Consultant shall submit a certification that all data and materials gathered and generated for the study has been turned over to PIDS and that they did not retain copies of the datasets; and that it will allow PIDS to verify if the data is complete.

i. Others

The Consultant shall sign a Non-Disclosure Undertaking with PIDS. Any information gathered and generated in the implementation of the project shall be processed subject to the applicable provisions of the Republic Act No. 10173, known as the “Data Privacy Act of 2012” and its Implementing Rules and Regulations and relevant issuances of the National Privacy Commission (NPC).

The Consultant shall also perform other related tasks as may be assigned by the Project Director.

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

Activities and Deliverables	Due Dates	Payment Tranches
Inception Report following PIDS template	1 week after signing of contract	15%
Report on the draft sampling strategy (as discussed in 4a, 4b, 4c, and 4d) and with explanation for the following: <ul style="list-style-type: none"> • Description of the target sample • Sampling frame • Sample selection procedure • Results of the power calculations • Sample size based on the power calculations, by type of questionnaire • Sampling weights (if applicable) 	3 weeks from signing of contract	40%
Final report on sampling strategy (as discussed in 4f) <ul style="list-style-type: none"> • The detailed final sampling strategy. • Documentation of the power calculations and their rationale. • Explanation of any sampling weights applied, if any. 	8 weeks after signing of contract	30%

<ul style="list-style-type: none"> Insights and recommendations regarding data analysis based on the sampling approach. 		
<p>Terminal report containing the following</p> <ul style="list-style-type: none"> Summary of accomplishments Project implementation issues/challenges Turnover of data and materials used for the whole project. Certification indicating the turnover of as well as the deletion of such data and that it will allow PIDS to verify if the data is complete. 	12 weeks after signing of the contract	15%

NOTE: Payments will be based on the acceptance and approval by PIDS of the corresponding outputs

5. Qualifications of the Consultant

The Consultant should have the following qualifications:

- Educational Background
 - Minimum: MA/MS in Statistics, Mathematics, or related discipline;
 - Preferred: PhD in Statistics, Mathematics, or related discipline;
- Professional and Research experience
 - Must be well-versed in survey sampling methodologies and tools
 - Must have at least five (5) years of experience in developing survey tools and/or analysis of survey data
 - Must have experience in developing survey sampling strategy for research that measures impact of interventions among program participants- at least one (1) completed project
- Other desired qualifications
 - Ability to respond to comments and questions in a timely appropriate manner
 - Ability to produce highly quality, clear, and concise reports in English

6. Project Duration

This engagement will commence upon the signing of the contract for a duration of 12 weeks, 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. .

7. Approved Budget for the Contract

The approved budget for this consulting service is up to **PHP482,000**, depending on the qualifications. This amount is inclusive of all applicable government taxes but exclusive of expenses for conducting the data collection and other preparatory activities, if any. PIDS shall

not cover hospitalization and other COVID-related health expenses of the consultant as no employer-employee relationship exists between the PIDS and the Consultant.

8. Evaluation Criteria

Consultants will be evaluated based on the following criteria:

<p>Consultant's qualifications</p> <ul style="list-style-type: none"> a. Educational attainment – At least master's degree in relevant fields or equivalent; PhD in Statistics, Mathematics, or related discipline preferred (20%) b. Experience in developing survey tools and/or analysis of survey data - At least five (5) years (20%) c. Experience in developing survey sampling strategy for research that measures impact of interventions among program participants - at least one (1) completed project (10%) 	50%
<p>Plan of approach and methodology:</p> <ul style="list-style-type: none"> a. Clarity, feasibility, innovativeness, and comprehensiveness of the approach b. Incisive interpretation of problems and reflection on suggested solutions 	50%
Total	100%

The detailed rating sheet is attached.

Prepared by: 
Dr. Michael Ralph M. Abrigo
Project Director

Reviewed by: 
Ms. Christine Ruth C. Salazar
Division Chief II, RPMD

-Original Signed-

Approved by: **Ms. Renee Ann Jolina C. Ajayi**
Department Manager III, Research Services