Rene Moawad Foundation

Productive Economic Inclusion in Lebanon (P180905)

Terms of Reference (ToR) Baseline, End-line Survey Firm

Proc Reference: LB-RMF-449777-CS-INDV

1. Background

Lebanon's compounding crises have had severe implications on the country's human capital. Poverty and vulnerability have increased significantly, with projections from the World Bank suggesting that well over 50 percent of the population were under the national poverty line in 2020. Unemployment has also risen sharply during the crises. Based on a World Bank survey targeting formal firms, one in five workers lost their jobs since October 2019, while 61 percent of formal firms surveyed decreased the number of permanent workers by 43 percent on average. Rising unemployment rates during the pandemic have also reduced household income, affecting their resilience in the face of the crises.

To support households, cope with the crises, the Government of Lebanon launched the Emergency Social Safety Net (ESSN) cash transfer program with financing from the World Bank. The program expands safety net coverage to 150,000 extreme poor Lebanese households that are socially vulnerable. While this will substantially increase the coverage of safety nets in Lebanon, it will not reach the high numbers of households that have gone into poverty during the crisis. At the same time, and in light of severe fiscal constraints in Lebanon, further support is required for households to overcome poverty through the labor market.

In this context of poverty and fragility, the World Bank has selected the Rene Moawad Foundation (RMF) to act as the Implementing Agency to pilot Productive Economic Inclusion in Lebanon (PEIL) project that provides livelihood support to a selected number of poor households targeting three Cazas. The objective of the pilot is to improve livelihood opportunities for 1,500 households that are current beneficiaries of the ESSN. Therefore, the PEIL Project complements the ESSN program by improving household welfare and resilience through productive economic inclusion. It strengthens sustainable pathways out of poverty by reducing household dependence on government assistance. To achieve the intended objectives of the pilot, the Project is composed of the following three components, based on well-evaluated programs around the world: (1) designing a data-driven economic inclusion program for Lebanon; (2) implementing the pilot program in selected regions; and (3) monitoring and evaluation to quantify the impact

and cost-effectiveness of the pilot. Through these activities, the project aims to inform the scale up of an economic inclusion program across Lebanon.

2. Objectives of the Assignment

The objective of the assignment is to develop and implement all aspects of the baseline survey and end line survey and ensure that all selected beneficiaries of the Productive Economic Inclusion in Lebanon (PEIL) pilot complete the questionnaire.

3. Scope of Work

Under the supervision of RMF and in close collaboration with the World Bank Task Team, the selected firm is expected to conduct data collection in three Regions (Cazas) Baabda/el Metn, Minnieh Dennieh and Saida/Jezzine, in order to map the beneficiaries based on received geographical coordinates, and to fill with them questionnaires in Arabic that will allow to gather all the requested information from them, in addition to that analyze the received data. The company will be responsible to fill the information's with 1725 households two times during the project implementation, at the start of the project (baseline) and at the end of the project (end line), In addition to this the company will be responsible to conduct 2 focus group discussions per region twice (before baseline, and after with end line) in order to assess whether the package of services provided by PEIL has an impact on beneficiary households in terms of sustainable increases in consumption, income, and overall relative poverty levels.

In order to estimate the impact(s) of the PEIL, the following methodology will be applied:
- The baseline survey will be conducted before the PEIL starts in November 2024, in order to estimate differences in the values of outcomes of interest at both the individual and household levels;
- The end line survey will be collected 18 months after the start of the project following the completion of the program to estimate the differences in value of outcomes.

4. Outputs / Deliverables of the Assignment

With the above-mentioned activities in mind, the selected firm will be expected to deliver the following outputs in English:

- Acquiring all permissions necessary for conducting the survey and the focus group discussion, if any. Where required, this may include relevant permissions from national and/or local authorities, and institutional review board (protection of human subjects) permissions;

- In collaboration with RMF and the World Bank Task Team, developing and piloting the baseline questionnaire and associated manuals that will be used for surveying the 1725

households, as well as the selected individual within each household. The questionnaire will include both household and individual-level rosters;

- Finalizing the baseline questionnaire and associated manuals by incorporating lessons learned during the pilot as well as feedback from technical experts;

- Translating the final English versions of the baseline questionnaire and associated manuals to Arabic and back to English to ensure that the arabic version is correct

- Selecting and providing a one-week training to at least 25 enumerators, field supervisors, and data entry operators (10-25 staff). The training will include the implementation of a one-day pilot for testing the readiness of enumerators, field supervisors, and data entry operators to successfully use the final versions of the questionnaire and associated manuals, software, and equipment before starting the field work. The firm should ensure the high-level understanding, implementation and data entry of its field and data entry staff.

- Preparing a fieldwork plan for ensuring the timely and successful completion of all data collection activities. The plan should outline in detail all aspects of the field work to be conducted by the Survey Firm, including:

    Plan for searching/reaching all 1725 households:
    a) Number of telephone calls per sample individual/household in order to reach them and confirm their participation (a minimum of FIVE calls per individual/household should be planned);
    b) Number of visits per sample individual/household for those that cannot be reached by telephone (a minimum of FIVE visits per individual/should, additional to the telephone calls made, should be planned);
    c) Plan for reaching households from replacement lists in cases where some of the original sample households could not be reached (after making FIVE attempts through calls/visits) or in cases of sample household refuse to participate;
    d) Coding strategy in order to ensure that each sample household and individual to be interviewed has a unique code for data entry that merges seamlessly across data sets;
    e) Composition of a standard field survey team (number of enumerators, number of field supervisors and number of field data entry agents, as well as their qualifications and training needs);
    f) Expected tasks and responsibilities of each member of the team;
    g) Number of additional telephone calls per individual/household planned for contacting/re-contacting following the field work to allow for interrupted surveys, revisions of incomplete or inconsistent information, and quality control;

h) Detailed calendar of activities;

i) The expected time each Survey Firm team will spend with each individual that is part of the sample;

j) Travel and lodging (if needed) logistics;

k) Management information / reporting tools for tracking progress of survey;

l) Supervision and spot check plans to ensure adherence to data collection protocols and confirm quality of data collection and entry, including a minimum of 10% of re-visits to a random sample of the evaluation sample to confirm the validity of the data;

m) Protocols and procedures for addressing data inconsistencies / misreporting when identified.

n) The fieldwork plan should be presented to RMF team for comments, and revised as necessary prior to commencing field work. The Survey Firm must then implement the survey, adhering as closely to the plan as conditions allow.

8. The Firm is responsible for providing its field staff with appropriate and sufficient questionnaires, manuals, identification cards, and all other field material as needed; as well as provide (and bearing the cost of) an adequate space facility with sufficient telephones and telephone lines for ensuring the successful completion of the field staff team work as needed.

9. During the field work, the Survey Firm is responsible for:

● Conducting consistency checks to ensure high quality of data collection;

● Producing a weekly report that includes a list of all the sample individuals/households who were contacted and visited during the past week of field work, specifying the household to which each individual belongs. The list must include information organized by region and districts (cazas). It must also specify whether the individuals were interviewed or not. If they were not, it must explain the reason (s) why the interview was not completed and identify a date for a new visit.

● Providing preliminary datasets (delivered in digitized form in excel format) with the information collected up-to-date.

10. Providing all documentation, to note that data collection should be completed digitally to ensure data quality, using platforms such as ODK (e.g., SurveyCTO). While internet connection is not required during household visits, digital tools enable layered checks on the data collection process. Ideally, the selected firm should have prior experience with digital data collection.

11. Managing data entry work during fieldwork (including telephone calls and field visits), in order to obtain a digital version of the information collected, and allowing for detection and recovery of missing information while in the field. Providing a high quality data entry software and manuals; and providing the data entry staff with appropriate data entry hardware, software, manuals and supervision.

12. Delivering all data in digital form, with complete information for all individuals;

13. Producing a report summarizing the methodology applied for collecting, entering, and cleaning the data. In addition to conducting basic analysis for the data.

14. Guaranteeing close collaboration with RMF team throughout the different stages of this work.

5. Qualifications

The selected firm/consortium shall possess the following qualifications:
- A legal status recognized by the Government of Lebanon, enabling the organization to perform the above-mentioned tasks.
- Demonstrated experience of organizing nation-wide surveys over the past five years.
- Strong capacity and experience in planning and organizing telephone, computer-based, and personal interview survey logistics.
- Good network of experienced enumerators, supervisors, and data entry clerks.
- Availability of the software to be used in the field with the needed equipment
- Strong capacity in data management and statistics.
- Strong knowledge in the following software applications/languages: Stata, SPSS or other statistical software.
- Strong interpersonal skills and a team-oriented spirit.

In addition, the selected firm/consortium is preferred to have the following qualifications:

- Experience working in the study areas of poverty targeting and economic inclusion.
- Experience working in multi-cultural and multi-language settings.
- Strong background in microeconomics, statistics and econometrics.
- Familiarity with skills assessment is preferable.
- Strong background in psycho-social measurement.
- Previous experience in impact evaluation.

Throughout the whole duration of this project the selected firm/consortium will assign to it a dedicated team including a **Field Operations Manager** and a **Data Manager** with the following responsibilities and required qualifications:

The **Field Operations Manager** shall be responsible for:

- the adaptation, piloting and translation of the questionnaires and other survey tools;
- the selection and training of the field staff;
- the development of a survey plan specifying when will each survey unit be observed, and by which staff;
- for defining the quality control procedures to be applied by the team leaders; and
- the logistics and control of field operations.

The **Field Operations Manager** will be a professional with a university degree and at least 3 years of experience in survey field work management.

The **Data Manager** shall be responsible for:

- the development and debugging of the survey data entry programs;
- selecting and training the data entry operators (or training the interviewers in data entry activities);
- defining the data transmission protocols and procedures;
- the logistics of data entry and data transmission;
- the permanent consolidation of survey datasets, and
- delivering them to the evaluation team and to the NPTP M&E Officer on a weekly basis.

The **Data Manager** will be a professional with a university degree in computer science or survey-related matters, and at least 5 years of experience with SQL or Visual Basic programming, development of survey data entry programs with (CSPro, LSD, Blaise or other platform), and complex survey data management with STATA, SPSS or other statistical software.

6. Timing and Reporting

The procurement process will be launched in September 2024, and a firm will be selected based on pre-determined criteria. The selected firm will report to the PEIL Project Manager and is expected to begin work in October 2024. It is expected that all the deliverables detailed under section 8 of these Terms of Reference will be submitted by January, 2024.

7. Data Confidentiality/Data Ownership/Data Re-use

All data collected under these TORs including the documentation about the data and its collection methodology should be treated as confidential. The consulting firm must comply with

World Bank's Data Security Standards when handling all data and documentation and consult the research team in case of any question. The consulting firm executing these TORs, must protect the confidentiality of responding individuals and establishments participating in the data collection at all stages. The consulting firm must ensure that data or the documentation referred to above, collected or compiled under these TORs, are not distributed for commercial or non-commercial purposes to third parties, nor will they be used by the firm, their staff and/or consultants, or their sub-contractors for purposes other than those expressly stated in these TORs, without the written approval of the World Bank prior to, during, or after completion of the assignments.

8. Deliverables and Terms of Payment

No.	Deliverables of the Baseline Survey	Target dates	Payment terms against each deliverable
1	List of staff to attend the fieldwork and data entry training	Week 1	-
2	Translating the baseline questionnaire into Arabic,	Weeks 1-2	5%
3	Training of enumerators, field supervisors, and data entry operators. Baseline questionnaire and associated manuals piloted during the training. Training report (including final list of enumerators, field supervisors, and data entry operators) and pilot dataset delivered in digitalized form.	Week 3	5%
4	Fieldwork plan, including description of travel arrangements for enumerators, field supervisors, and data entry operators; quality controls; and plan for searching all the households, and individuals within each household, to be interviewed.	Weeks 2-4	5%
5	Conduct 2 focus group discussions per region, including recordings and transcripts	Weeks 2-4	-
6	Baseline data collected for approximately 1,725 households: raw datasets with the information collected up-to-date delivered in digitalized	Weeks 4- 11	-
7	Weekly reports of the field work with lists of the households, and individuals within each household, that were: (i) effectively reached, visited and surveyed; (ii) those that were reached but could not be visited, or that were not visited yet; and (iii) those that could not be reached, or that were not reached yet --including information on any difficulties experienced throughout the field work and suggestions for addressing such difficulties.	Weeks 4-11	-

8	Complete raw dataset delivered in digitized form.	Week 12	25%
9	Complete cleaned and analyzed dataset delivered in digitalized form	Week 13	5%
10	Electronic files of all filled questionnaires submitted to RMF team.	Week 13	-
11	Report, in English, with the number of questionnaires that were fully completed, partially complete, or failed to complete as well as all difficulties encountered in the fieldwork. Translated into Arabic and back to English to ensure that the arabic version is correct	Week 13	5%

No.	Deliverables of the Endline Survey	Target dates	Payment terms against each deliverable
1	Translating the end line questionnaire into Arabic,	Weeks 1-2	5%
2	Refresher Training of enumerators, field supervisors, and data entry operators. Baseline questionnaire and associated manuals piloted during the training. Training report (including final list of enumerators, field supervisors, and data entry operators) and pilot dataset delivered in digitalized form.	Week 3	5%
3	Fieldwork plan, including description of travel arrangements for enumerators, field supervisors, and data entry operators; quality controls; and plan for searching all the households, and individuals within each household, to be interviewed.	Weeks 2-4	5%
4	Conduct 2 focus group discussions per region, including recordings and transcripts	Weeks 2-4	-
5	End-line data collected for approximately 1,725 households: raw datasets with the information collected up-to-date delivered in digitalized form.	Weeks 4- 11	-
6	Weekly reports of the field work with lists of the households, and individuals within each household, that were: (i) effectively reached, visited and surveyed; (ii) those that were reached but could not be visited, or that were not visited yet; and (iii) those that could not be reached, or that were not reached yet --including information on any difficulties experienced throughout the field work and suggestions for addressing such difficulties.	Weeks 4-11	-
7	Complete raw dataset delivered in digitized form.	Week 12	25%

8	Complete cleaned and analyzed dataset delivered in digitalized form	Week 13	5%
9	Electronic files of all filled questionnaires submitted to RMF team.	Week 13	-
10	Report, in English, with the number of questionnaires that were fully completed, partially complete, or failed to complete as well as all difficulties encountered in the fieldwork.	Week 13	5%

9. Duration of the Assignment

Duration of the assignment is 3 months for the baseline and 3 months for the end-line.