Terms of Reference

SUBCONTRACT:	Data collection for the Midline EGRA of Grade 2 learners drawn from approximately 1,000 government-run and community schools in the five target provinces of Zambia.
TYPE OF SUBCONTRACT	Firm Fixed Price
PROJECT:	USAID Education Data activity
SUPERVISORS:	Program Manager / Team Lead and HO Program Manager
PLACE OF WORK	Eastern, Muchinga, North-Western, Southern and Western provinces
QUESTIONS DUE BY:	May 4, 2020
FINAL SUBMISSION OF PROPOSAL DUE BY:	May 18, 2020
TENTATIVE START DATE:	June 1, 2020

I.   BACKGROUND

The 3.5 year USAID Education Data activity implemented by DevTech Systems, Inc. began in April 2018, with the objective to provide education assessment, data management, and research and evaluation services in support of the USAID *Let's Read Project* that targets five provinces in Zambia. The Education Data activity is also working closely with MoGE units and Examinations Council of Zambia (ECZ) to carry out all planned activities.

During the first year of the activity, the Education Data activity conducted:
1. Language mapping exercise – provided a detailed database of 4,626 schools in the five Let's Read, Zambia target provinces by Language of Instruction, school type and location.
2. A large-scale baseline Early Grade Reading Assessment (EGRA) to assess the reading skills of over 15,000 Grade 2 learners
3. Dissemination events of the baseline EGRA results in each of the five target provinces with stakeholders from the MoGE and ECZ.

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In 2020 Education Data activity began preparations for the Midline EGRA to assess schools sampled in the baseline in addition to assessing additional schools from the five target provinces starting in September 2020.

II.   INTRODUCTION

In 2006, USAID began work on the creation of an Early Grade Reading Assessment (EGRA): a simple instrument that could report on the foundation levels of student learning, including assessment of the first steps students take in learning to read. USAID contracted RTI International through the Education Data for Decision Making (EdData II) project to develop an instrument to help countries in Latin America, Asia, and Africa measure how well children in the early grades of primary school were acquiring reading skills. Ultimately, the hope was to spur more effective efforts to improve performance in these core skills by using an assessment that can easily be adapted to new contexts and languages, has a simplified scoring system, and is low stakes and less time intensive for the individuals being assessed.

USAID/Zambia has supported EGRA data collections on several occasions over the past few years in partnership with the Ministry of General Education (MoGE) and the Examinations Council of Zambia (ECZ). Under the USAID Education Data activity, the baseline EGRA, which was conducted in November 2018, assessed Grade 2 learner skills in: (1) listening comprehension in local languages; (2) letter sounds; (3) syllable sounds; (4) non-word reading; (5) oral reading fluency; (6) reading comprehension; (7) listening comprehension in English and; (8) English vocabulary. Along with the EGRA, the USAID Education Data Activity also administered Snapshot of School Management Effectiveness tools including a learner questionnaire, teacher questionnaire, head teacher questionnaire, and a school inventory checklist.

The USAID Let's Read Project (Lets Read), implemented by Education Development Center (EDC), seeks to improve early grade reading skills among learners from – Early Childhood Education (ECE) to Grade 3. The results of the 2018 Baseline EGRA established a baseline level from which changes in Grade 2 learners' performance in the core reading skills can be tracked over time to inform the implementation of Let's Read. Currently, Education Data activity is in the process of preparing to conduct the Midline EGRA, which will comprise i) 2018 baseline and 2020 midline comparisons from the 5 target provinces of Let's Read (Eastern, Western, North-western, Muchinga, and Southern). Throughout the document, the term "Midline EGRA" refers to the aforementioned (i) and (ii) descriptions unless specified otherwise. Accordingly, the Midline EGRA aims to answer the following questions:

Comparability of 2018 baseline and 2020 midline in the 5 Let's Read target provinces:

- In comparison to the baseline levels, what is the current reading status of Grade 2 learners after a year of Let's Read implementation?
- Where are Grade 2 learners proficiencies' in the core reading skills in comparison to the MoGE benchmarks and Let's Read's targets?
- What are the significant predicators of oral reading fluency?

The Midline EGRA instruments contain 2 central components that assess learner reading abilities and school environment data.

Component 1: for the learners

1. Letter-sound identification
2. Syllable naming fluency
3. Invented (nonword) reading

4. Oral reading fluency
5. Reading comprehension
6. Listening comprehension
7. English listening comprehension
8. English vocabulary

Component 2: Snapshot for School Management Effectiveness (SSME) and School Profile

This component produces a comprehensive picture of the school's learning environment.

1. Learner Questionnaire
2. Teacher Questionnaire
3. Headteacher Questionnaire
4. School Inventory Checklist
5. School Profile

To this end, the terms of reference are developed for the recruitment of the services of a local survey firm or institution interested in supporting the implementation of the Midline EGRA to a sample of approximately 20 learners (10 boys and 10 girls) in approximately 1,000 government-run and community schools from the 5 target provinces of Zambia. Education Data activity will provide the final sample of schools consistent with USAID consultation, and interested local survey firms or institutions prior to execution of the sub-contract. However, interested firms may assume a sample size of approximately or up to 1,000 schools in total. The local survey firm or institution will be integrated into a working group comprised of staff from Education Data activity, ECZ and the MoGE to collaboratively plan for data collection. The working group will begin preparations starting the day the contract is executed, anticipated to be early in May, and will meet regularly through the end of data collection in November 2020. The local survey firm or institution will be fully responsible for the logistics and administrative activities to prepare for and carry out data collection in all 5 provinces.

The development of the EGRA instruments, sampling plan and mechanisms for electronic data collection, and the expense associated with these items are the responsibility of DevTech and its implementing partner, Management Systems International (MSI). Consistent with previous EGRA exercises, the local survey firm or institution, in coordination with ECZ and Education Data activity, will recruit and apply selection criteria to select the individuals to attend both the Quality Control Officer (QCO) and assessor training workshops. A list of high-performing QCOs and assessors used in the 2018 baseline EGRA, as well as any additional candidates recommended by ECZ, MoGE, and/or the survey firm or institution, will be used to support the selection of data collectors.

During the training workshop, the local survey firm or institution will be fully responsible for the logistics and planning in addition to the preparations of training materials for sessions focused on logistics. The local survey firm will train data collection teams on logistical and administrative procedures based on the Test Administration Manual. ECZ and Education Data activity will ensure quality assurance of the local survey firm or institution's selection of assessors and QCOs by observing each participants' performance in administering the EGRA and SSME tools, following protocols and processes and assessing their inter-rater reliability scores. QCOs and assessors that do not score at least 90% agreement rate in their inter-rater reliability assessments will not be deployed to the field to collect data.

The local survey firm or institution will collaborate with Education Data and ECZ activity to plan for and administer the EGRA in all 5 provinces between September and December 2020. QCOs and assessors will utilize tablets provided by USAID Education Data activity for electronic data collection. Assessor

and QCO performance will be monitored both in-person through randomized checks as well as remotely through the Myna dashboard.

The proposed activity and timeline assume that the subcontractor can proceed with the data collection activities beginning in September 2020. The schedule is dependent on the status of COVID-19 health and safety guidance at that time.

III. OBJECTIVES OF THE SUBCONTRACT

The purpose of this contract is to carry out the Midline EGRA to assess the early grade reading skills of Grade 2 learners in both government and community schools in the sample. The results of the Midline EGRA will enable comparisons from the baseline to determine changes in learners' outcomes over time to inform programmatic decision-making of both Let's Read and the MoGE.

Specific Objectives:

The specific objectives of this contract are to support the overall successful implementation of the Midline EGRA by carrying out the following:

1. Support Midline EGRA coordination planning through the development of an efficient and cost-effective data collection plan as specified by Education Data activity staff
2. Ensure collection is adequately supported with the hiring and supervising of approximately 80 QCOs and 160 assessors to carry out the data collection
3. Assist in preparing all assessors and QCOs to carry out data collection, including implementing all logistical arrangements for both the QCO and assessor training, presenting sessions on data collection logistics and preparedness, and coaching data collection teams to apply assessment tools with fidelity
4. Ensure data is accurate and of high-quality through tracking data collection in all 5 provinces in an Excel database to guarantee each sampled or replaced school and the required number of learners are assessed
5. Ensure data collection teams are coordinating with provincial (PEO), district education board (DEB) offices and headteachers to observe proper MoGE protocols
6. Support data collection teams to problem solve and communicate needed support to effectively assess all schools in the sample and replacement selection. The sample selection and all replacement schools will be solely be selected by Education Data activity staff
7. Collaborate in all working group meetings to ensure preparations for the Midline EGRA accurate align to the Midline EGRA methodology and requirements

IV. SCOPE OF THE SUBCONTRACT

Preparations

- Once the contract is executed, attend all EGRA working group meetings with Education Data activity, MoGE and ECZ staff. These meetings will occur approximately once a month beginning in May; however, it is expected that they will increase in frequency leading up to the assessor training.

- For select planning meetings with ECZ and Education Data activity, procure a venue, lunch and tea breaks and print required materials to facilitate the meetings. Plan and execute logistical tasks that may be required to support these meetings.
- Revise particular sections of the Education Data activity Test Administration Manual used at baseline for the midline data collection in accordance with the logistics arrangements approved in the midline data collection plan.
- Prepare training materials for logistical sessions for the QCO and assessor training. Other EGRA training materials focused on the EGRA tools, including how to administer them with students will be developed by staff from ECZ and Education Data activity.
- Develop a detailed training and data collection plan that includes a schedule for each data collection team to assess each sampled school with maximum efficiency. The detailed training and data collection plan should include but is not limited to: (1) logistics and preparations for up to 3 planning meetings; (2) logistics and preparations for both the QCO and assessor training; (3) team distribution by province and language that aligns to the sampling plan; (4) dry run logistics and preparations; (5) detailed data collection timeline including how teams will be assigned; (6) overview of policies and procedures for daily subsistence allowances during training and data collection for QCO and assessors in accordance with USAID and MoGE regulations; (7) travel arrangements to provinces, districts and schools; (8) checklist(s) with timeline for all preparations leading up to midline data collection; (9) protocols and procedures for engaging with provincial, district and school level stakeholders such as, PEOs, DEBS, and headteachers; (10) a detailed budget to account for all expected costs; and (11) key risks and assumptions in addition to methods of mitigating those risks.

Recruitment

- Draft and submit recruitment and screening protocols for QCOS and assessors with input from Education Data activity and ECZ staff.
- Assess and verify the language abilities of all applicants in accordance with the language of instruction that they will assess learners in
- Verify all selected applicants meet child protection requirements, have prior experience with data collection and familiarity with tablets or other handheld electronic devices.
- Develop independent consulting agreements (ICA) for all hired QCOs and assessors that outline their scope of work, the terms of renumeration and all requirements, and rules and policies to be followed. All ICAs will be submitted to DevTech HO contracts department for review and approval against USAID rules and regulations.
- Invite up to 90 QCOs and 180 assessors in proportion the language requirements aligned to the sampling plan to participate in the QCO and assessor training. Approximately 80 QCOs and 160 assessors will be selected to conduct data collection in the field. Additional individuals will serve as back-ups in the case of illness, emergencies, or unsatisfactory performance.

QCO and Assessor Training

- Attend and participate in pre-training meetings with Education Data activity and ECZ staff
- Procure venues, required multimedia equipment, tea breaks and lunches consistent with USAID cost principles and competitive market rates for two 5 day trainings. For the QCO training, it is anticipated that there will be a total of 110 participants and for the assessor training, it is anticipated that 285 participants will attend. The contractor is encouraged to consider several cost-effective training methodologies such as one large training in Lusaka or combined provincial trainings along with the pros and cons of each model.

- Make logistical arrangements including transportation and accommodation for QCOs and assessors traveling to participate in the training as well as for primary schools for participants to practice administering the EGRA and SSME tools (headteacher, learner, and teacher questionnaire and the school inventory checklist).
- Print all training materials ahead of the training and distribute accordingly
- Design training materials to support training sessions dedicated to logistics, the data collection plan, and other sessions as appropriate.
- Team members will participate in the 5-day QCO training and lead sessions pertaining to data collection schedule and planning. Other training sessions will be led by ECZ and Education Data activity staff.
- Timely electronic disbursement of both daily subsistence allowances and transportation refunds to all participants who are traveling to attend the QCO and/or assessor training in accordance with USAID and MoGE regulations, and the approved ICA for each participant.
- Provide additional as needed technical and logistical support to ensure training runs smoothly
- Hire at least 80 QCOs and 160 assessors that meet IRR quality standards during training for midline data collection. Submit all signed Independent consulting agreements to Education Data activity prior to data collection.
- Education Data activity will provide electronic tablets, chargers, and power banks for each assessor to practice during training and for data collection. However, the local survey firm or institution will be responsible for ensuring that all tablets and associated materials are safeguarded during training and data collection and are returned to Education Data activity after data collection has finished. Each QCO and assessor will be required to sign a tablet agreement form in order to be provided with a tablet for their usage during training and data collection
- Other equipment for training – such as projectors, whiteboards, markers, chart paper should be procured by the local survey firm or institution.

Dry-runs

- Communicate with PEOS, DEBS, and headteachers from each of the selected schools ahead of the dry-runs to ensure Grade 2 learners are present and a quiet place has been arranged to conduct the assessment
- Working with ECZ and Education Data activity, seek permission from the appropriate MoGE personnel to schedule and conduct dry-runs in primary schools in each of the five provinces.
- Make logistical arrangements for all QCOs and assessors, including transportation and accommodation during dry-runs.
- Timely disbursement of both daily subsistence allowances and transportation refunds to all participants who are traveling to attend the dry-runs in each of the provinces.
- Supervise and monitor 2-days of dry-runs in each of the five provinces with ECZ staff to ensure QCOs and assessors are following procedures and protocols and are provided with feedback as needed.
- Secure a meeting room (e.g. provincial resource centers) to be used after each day's dry-run to provide clarifications and debrief with all QCOs and assessors.
- Support ECZ and Education Data activity staff to lead debrief sessions with QCOs and assessors and facilitate support that is required.
- Communicate performance feedback to each data collection team.
- Troubleshoot problems as they arise and communicate any issues with Education Data activity staff.

Data Collection

- Ensure the EGRA and learner questionnaire are administered to up to 20 learners (10 girls and 10 boys) in each of the sampled schools from all five provinces.
- For each of the sampled schools, ensure the headteacher and teacher questionnaires are administered to one Grade 2 teacher and one headteacher, and that the school inventory checklist is completed.
- Communicate with headteachers from each of the sampled schools ahead of data collection to ensure Grade 2 learners are present and a quiet place has been arranged to conduct the assessment.
- Communicate with Education Data activity if school replacements are needed due to closures or other circumstances. Education Data activity staff will retain sole authority to select all replacement schools.
- Working with ECZ and Education Data activity, ensure the appropriate permission from MoGE personnel to schedule and conduct the EGRA and SSME tools in primary schools in each of the five provinces.
- Make logistical arrangements for all QCOs and assessors, including transportation and accommodation for the entire period of data collection, including return travel to their home district afterwards.
- Supervise and monitor data collection in each of the five provinces with ECZ and Education Data activity staff to ensure QCOs and assessors are following procedures and protocols and are provided with feedback as needed.
- Communicate IRR feedback to each data collection team based on reports from ECZ and Education Data activity.
- Provide logistical and IT support to data collection teams in addition to adequate data/airtime for tablets to ensure all assessments are uploaded to the server on a daily basis. Communicate and troubleshoot any issues as they arise with support from Education Data activity staff.
- Ensure timely electronic disbursements of transport stipends, salaries, and daily subsistence allowances (DSA) payments to all QCOs and assessors to enable them to conduct data collection. Payments should be split up into several installments to incentivize teams to complete it.
- Ensure that all tablets and associated EGRA equipment are accounted for and safely stored throughout data collection.
- Ensure data collection teams have a backpack for proper storage of all testing materials including the during dry-runs and data collection.
- Ensure data collection teams collect the following information as part of the School Profile for each school that is assessed: (1) name of school; (2) name of head teacher; (3) contact details; (4) location (Province, district and zone); (5) type of school (community or public, with or without Early Childhood Education(ECE)); (6) GRZ Designated Language of Instruction; (7) Education Management Information System (EMIS) number; (8) total number of students (disaggregate by sex, grade); (9) total number of teachers (disaggregated by sex/trained by Let's Read Zambia); and (10) number of literacy teaching and learning materials in each Grade 2 classroom to enable calculation of the Pupil: book ratio.
  or

After Data Collection

- Collect all electronic tablets (inclusive of their chargers, adapters, and other project equipment), physical copies of all EGRA and SSME tools as well as any other materials provided to data collection teams and deliver them to the Education Data activity office in Lusaka
- Provide logistical support to data collection teams to return to their district after data collection finishes
- Disburse and collect proof of payment forms from all QCOs and assessors who received daily subsistence allowance and/or funds under the local survey firm. DevTech will provide a template that the local survey may use. Scanned copies of all forms with signatures from all QCOs and assessors will be submitted to DevTech at the conclusion of data collection.
- Organize and lead a debrief meeting with DevTech Field Office to review lessons learned, challenges and solutions from the midline data collection.

V.   DELIVERABLES

To meet the requirements of the subcontract, the local survey firm will develop and submit the following deliverables:

1. Detailed Work Plan
     a. Detailed description of the organization and composition of the team who will support data collection in addition to the timelines that will be observed.
     b. Supervision plan that outlines the data quality assurance procedures that will be utilized

2. Training and Data Collection Plan
     a. Logistics and preparations for the QCO and assessor training, including procurement of the venue, tea breaks and lunch, and necessary materials to support training;
     b. Team distribution by province and language that aligns to the sampling plan;
     c. Dry run logistics and preparations;
     d. Detailed data collection timeline for midline EGRA including how teams will be assigned;
     e. Overview of policies and procedures for daily subsistence allowances during training and data collection for both government and non-government employees in accordance to USAID and MoGE regulations;
     f. Travel arrangements to provinces and districts;
     g. checklist with timeline for all preparations leading up to midline data collection.
     h. A detailed budget to account for all expected costs and;
     i. Key risks and assumptions in addition to methods of mitigating those risks.

3. Assessor and QCO documentation packet – scope of work and employment contracts for hiring quality control officers and assessors to carry out data collection; signed independent consulting agreements for all hired QCOs and assessors; ethical procedure form; criminal statement form; tablet agreement; and consent for photography and video form submitted to Education Data activity prior to data collection.

4. Summary report – that outlines the major achievements, challenges and lessons learned from the (1) QCO training; (2) assessor training; (3) dry-runs and (4) data collection. Attendance registers and the results of evaluations forms from participants should be included as annexes. The report should be no longer than 5 pages (not including annexes).

5. Weekly progress reports during data collection that outline the number of schools and learners assessed by school, district, and province for that week. Any challenges, issues and other relevant aspects of the data collection will also be included in the report in addition to the major achievements and lessons learned, and photographs from monitoring. The report will be in Microsoft Excel and Word.

6. Completion of the midline data collection – verification from the Myna dashboard that assessors and QCOS assessed 100 percent of the Grade 2 sample, comprising of: EGRA assessments using the final, approved tool; learner, teacher and headteacher questionnaire; and school inventory check list.

7. Submission and approval of the Data Collection Tracking Tables for each of the 5 provinces which includes verified school profile data for each sampled school. The excel dataset will include the following information for each school assessed at midline: (1) name of school; (2) name of head teacher; (3) contact details; (4) location (Province, district and zone); (5) type of school (community or public, with or without Early Childhood Education(ECE)); (6) GRZ Designated Language of Instruction; (7) Education Management Information System (EMIS) number; (8) total number of students (disaggregate by sex, grade); (9) total number of teachers (disaggregated by sex/trained by Let's Read Project); and (10) number of literacy teaching and learning materials in each Grade 2 classroom to enable calculation of the Pupil: book ratio.

8. Proof of payment – signed and scanned proof of payment forms for all QCOs and assessors who participated in data collection and training. A template will be provided to the local survey firm that may be used to ensure that all data collection teams received compensation for their field work.

9. A detailed financial report for the costs associated with each step of data collection including; (1) planning meetings; (2) QCO and assessor training; (3) transportation to the provinces, districts and schools including receipts for any transport procured under the subcontract; (3) accommodations including copies of all lodging receipts; and (4) DSA and salaries paid to all data collection teams. To be submitted within two weeks after the completion of data collection. Scanned copies of all receipts categorized by each budget line item for expenses paid are to be included.

VI.   PROFESSIONAL PROFILE

The local survey firm or institution should possess the following experience and qualifications

Minimum Qualifications of the Local Survey Firm or Institution:
1. Be legally registered by PACRA as a company to operate with certificate of incorporation; or, if an institution, be legally registered by the Government and Higher Education Activity and possess all the appropriate permissions to conduct the aforementioned activities
2. Be able to provide a registered DUNS number[1] and register with System for Award Management (SAM)[2] in addition to provide audited financial statements for the past 3 years per USAID due diligence requirements.[3]
3. Have at least 10 years of experience working in Zambia, with knowledge of the five provinces included in the midline EGRA and institutional recognition by stakeholders for their work
4. Have at least 5 years of experience in planning, organizing, and carrying out data collection in government-run and/or community schools in Zambia. Special priority will be given to organizations with prior experience conducting EGRAs.
5. Have leadership and supervision experience of data collection teams in the field. In additional to experience in evaluations and research in the education sector.

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[1] A DUNS number can be obtained via the following link: https://www.grants.gov/applicants/organization-registration/step-1-obtain-duns-number.html
[2] Please use the following link to register with SAM: https://www.sam.gov/SAM/pages/public/loginFAQ.jsf

6. Possess a deep understanding of the Zambian education system, including the MoGE units at the zonal and district level,
7. Deep understanding of the linguistic diversity within the five target provinces included in the midline EGRA.
8. Strong organizational culture that centers around teamwork, strong interpersonal skills, mutual respect for team members and an unwavering commitment to excellence and detail in all aspects of their work

Desired Qualifications
1. Experience with electronic data collection, including the configuration of tablets, use of a dashboard for monitoring and uploading assessments to a server
2. Within team members possess knowledge or expertise in the seven languages of instruction of the midline EGRA (Chitonga, Cinyanja, Icibemba, Kiikaonde, Lunda, Luvale, and Silozi)
3. Prior experience working with the MoGE and ECZ to carry out data collection

The proposal should include candidates for the following positions:

Lead Study Coordinator[4]:

1. Professional with at least 10 years of experience in Education, Sociology, Psychological and preference for a teacher or researcher attached to an institution
2. Previous experience coordinating studies, with special preference to those with EGRA or large-scale assessment experience
3. Knowledge of best practices in data collection and data quality assurance measures, including familiarity with inter-rater reliability scores, common data entry or assessor errors, remote and in-person monitoring methods among others
4. Strong skills in planning, design and conducting training of assessors to conduct data collection. Experience delivering training to a large number of adults using participatory approaches
5. Strong organizational, financial, and analytical skills to develop data collection plans and timelines, budgets for activities, field work reports and other management and technical reports in relation to data collection
6. Experience in the education sector and in research assessing learner outcomes. Preference for a candidate with deep knowledge of the core EGRA reading skills (listening comprehension, letter sounds, non-word Reading, oral Reading fluency and Reading comprehension)
7. Professional proficiency in at least one of seven of the languages of instruction in addition to English
8. Possess an unwavering commitment to excellence in all the work they do, and commitment to collaboration and teamwork among several different stakeholders

Training Specialist(s):

1. Professional with at least 5 years of experience in education, sociology, or psychology with experience designing and delivering training and/or instruction to adults
2. Previous experience training enumerators for data collection, with special preference to those with EGRA experience
3. Strong skills in planning, design and conducting training of assessors to conduct data collection Experience managing and delivering training to a large number of adults using participatory approaches

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[4] The Lead Study Coordinator will be in charge of coordinating and supervising all field work, in addition to the point of contact for relations between the organization, ECZ, MoGE and DevTech.

4. Strong planning skills to design PowerPoints, handouts, and other training materials in accordance with best practices in implementation of EGRA or other large-scale assessments
5. Experience in the education sector and in research assessing learner outcomes. Preference for someone with deep knowledge of the core reading skills of the EGRA (listening comprehension, letter sounds, non-word Reading, oral Reading fluency and Reading comprehension)
6. Professional proficiency in at least one of seven of the languages of instruction in addition to English
7. Possess an unwavering commitment to excellence in all the work they do, and commitment to collaboration and teamwork among several different stakeholders

Logistics and Administrative Assistant(s)

1. Professionals with a degree in Education, Psychology, Business Management, Administration and/or Operations with preference for individuals with experience managing logistics for research and evaluations. Two years of experience supporting data collection in the field, preferably with experience or supervision of EGRAs or other large-scale assessments.
2. Professional proficiency in at least one of the seven languages of instruction in addition to English
3. Possess an unwavering commitment to excellence in all the work they do

Financial and Operations Support

1. Professional with a master's degree in finance, accounting, financial management or another related field
2. Five years experiences in the procurement and financial management for organizing conducting research and evaluations with data collection in the field
3. Prior experience and qualifications in developing detailed and accurate budgets for large-scale data collection, and in supervising all procurement under contracts
4. Special preference for individuals with experience working under USAID rules and regulations regarding procurement, financial reporting, and accountability
5. Possess strong problem-solving and communications skills as well as commitment to transparency attention to detail
6. Possess an unwavering commitment to excellence in all the work they do

VII.   IMPLEMENTATION PLAN:

The entire subcontract will last approximately 7 months, beginning with initial kick-off planning meetings in in May 2020 with ECZ, Education Data activity, MoGE and USAID. It will last through the end of data collection, approximately December 2020. The subcontract will begin on the day the subcontract is signed by all parties and will be considered complete with the delivery and approval of all final deliverables by December31st, 2020. Table 1 outlines an estimated implementation plan for the midline EGRA.

TABLE 1. MIDLINE EGRA TASKS WITH LOCAL SURVEY FIRM OR INSTITUTION INVOLVEMENT										
TASKS	DESCRIPTION	LOCAL SURVEY FIRM RESPONSIBILITIES	May-20	June-20	July-20	Aug-20	Sept-20	Oct-20	Nov-20	Dec-20
1.PREPARARTIONS FOR THE MIDLINE EGRA	Planning committee forms and meets on a monthly basis	Attend all monthly meetings, provide updates on progress made and contribute to preparations	▓	▓	▓	▓	▓	▓	▓	▓
	Finalize subcontract	Sign on the terms outlined in the agreed upon subcontract	▓							
	Identify & prepare logistics	Develop and finalize the work plan and seek DevTech approval for the plan	▓							
		Develop training and data collection plan and submit to DevTech for approval		▓						
	Midline EGRA sampling plan	Use approved sampling plan to finalize data collection team logistics including transportation and accommodations			▓					
	Tools validation meeting	Participate in the Tools validation meeting	▓							
2. PROGRAM TOOLS FOR ELECTRONIC DATA COLLECTION	Tools programmed into Tablets and tested; dashboard set up	Participate in selected sessions on Myna electronic data collection		▓						
3.QCO & ASSESSOR TRAINING	Finalize all logistics and materials for QCO and assessor training	Local survey firm to support venue procurement, tea breaks and lunches, local schools for practice, transportation, and accommodation as necessary			▓	▓				
	Seek letter of permission from PS	ECZ will seek permission from the PS and PEOs but the local survey firm will confirm appropriate approvals prior to contacting PEOs, DEBS and schools to schedule data collection		▓	▓					
	Evaluate and hire QCOs and Assessors candidates	Local survey firm with Education Data activity and ECZ support will assess all candidates for language abilities, child protection guidelines and other agreed upon criteria				▓				
	Invite QCOs and Assessors to training	Local Survey firm to support logistical preparations to support candidates to attend QCO and assessor training				▓				
	Training materials and workshop venue	Print all training materials and ensure all necessary equipment is procured and set-up for training				▓				
	Train QCOs	Participate in training, lead sessions on data collection schedule and logistics of data collection.				▓	▓			

TABLE 1. MIDLINE EGRA TASKS WITH LOCAL SURVEY FIRM OR INSTITUTION INVOLVEMENT										
TASKS	DESCRIPTION	LOCAL SURVEY FIRM RESPONSIBILITIES	May-20	June-20	July-20	Aug-20	Sept-20	Oct-20	Nov-20	Dec-20
	Train Assessors	Participate in training, lead sessions on data collection schedule and logistics of data collection.					▓			
	Schedule schools for dry-runs	Once ECZ has communicated with PEOs, coordinate with all schools participating in the dry-runs to ensure learners are present.			▓	▓				
8.DRY RUNS IN PROVINCES	Make transport and accommodation arrangements for QCOs, assessors and the provincial supervisors to the provinces	Local survey firm will make transport arrangements either through public transport or hiring of vehicles					▓			
	Conduct practice sessions in provinces	Monitor dry-runs with ECZ and Education Data activity staff				▓	▓			
	Supervise transportation and accommodation of QCOs and Assessors to Districts	Local survey firm to plan and supervise to facilitate data collection					▓			
9.MIDLINE DATA COLLECTON	Data collection	Supervise and support data collection teams to carry out the midline data collection					▓	▓	▓	
	Monitor data collection	monitor data collection in each of the five target provinces. Make all logistical arrangements to support monitoring for the local survey team					▓	▓	▓	
	Payment of DSAs	Ensure the timely disbursement of electronic payments to all QCOs and assessors to support data collection					▓	▓	▓	
	Verification of midline EGRA data collection	DevTech via the Myna dashboard and field reports to verify that data were collected from up to 20 learners in each of the sampled schools along with the questionnaires and school inventory checklist.					▓	▓	▓	
10. SUBMIT ALL FINAL DELVIERABLES	Proof of payment and financial summary	Submit detailed financial summary and proof of payments for all QCOs and assessors to DevTech						▓	▓	
	Collect data & materials and clear QCOs	Submit all materials to Education Data activity office in Lusaka							▓	▓

VIII.   OPTIONAL ACTIVITIES – TO BE APPROVED BY USAID/ZAMBIA

Currently under review by USAID is a proposal to conduct the Midline EGRA across all 10 provinces instead of only within the five target provinces of Let's Read. If approved, the following optional activities would be exercised under this subcontract. In this scenario, the subcontractor would be asked to provide logistical and administrative support to also conduct the EGRA in the additional provinces. This would include but not be limited to the following:

- Administer the EGRA and SSME tools in one of the seven languages of instruction
- A portion of schools in the final sample would be drawn from the five target provinces of Let's Read – Eastern, Muchinga, North-Western, Southern and Western provinces
- The remaining portion of schools in the final sample would be drawn from the other five provinces in Zambia–Central, Copperbelt, Luapula, Lusaka and Northern provinces.

If the optional activities are exercised, they will be executed during the same period of performance, between June and November 2020. The contractor would be expected to conduct the same preparation, recruitment, QCO and assessor training, dry-runs and data collection activities as outlined in this Terms of Reference but the work would be organized to support data collection in all 10 provinces rather than in just the five target provinces of Let's Read. All activities, such as training, dry runs and data collection will occur at the same time for all 10 provinces. This may result in the following required revisions and considerations for the data collection plan, timeline of activities and budget:

- Include additional QCOs and assessors needed to administer the assessment in all 10 provinces in accordance with the language of instruction used
- Additional transportation costs to enable teams to travel to all 10 provinces and the additional schools
- Revision to timelines and team compositions to enable teams to collect data in approximately 1,100 schools between September 20 – November 15, 2020
- Additional coordination and communication with PEOs, DEBS and headteachers to obtain the necessary approvals ahead of data collection and to schedule data collection with each of the sampled schools.
- Identification of primary schools within the additional five provinces for dry-runs

In preparing a response to this Terms of Reference – please provide a budget for both scenarios in addition to a section outlining the expected changes to the data collection plan and timeline that would result should these optional activities be exercised. Please see the budget template provided for more information.

IX.   PAYMENT

This subcontract will be disbursed in four payments, according to the submission and approval of the following products:

- First disbursement corresponding to 20% after the approval of the: (1) detailed Work Plan; and (2) training and data collection plan (deliverables 1 and 2).
- Second disbursement corresponding to 30% successful completion of the (1) QCO and assessor training; (2) submission and approval of the corresponding summary reports; and (3) assessor and QCO documentation packet (deliverables 3 and 4).

- Third disbursement corresponding to 30% after the completion of the midline EGRA data collection in approximately 1,000 schools as verified by the Myna dashboard (deliverable 5 and 6)
- Fourth disbursement corresponding to 20%, for 100% of the subcontract value after the approval of the school profile database, submission and approval of the financial report documenting expenses, and proof of payment for all QCOs and assessors to the satisfaction of DevTech, ECZ and USAID (deliverables 7, 8 and 9).

X. CHILD PROTECTION, CONFIDENTALITY AND THE USE OF IMFORMATION

The organization will assure that in all processes related to this study, DevTech's child protection policy is implemented, along with all USAID regulations regarding the use of primary data collected for the study. The data collected as part of this study including the; (1) EGRA assessment results; (2) learner, teacher and headteacher interviews; (3) school inventory checklist and the EGRA tools themselves belong to USAID and DevTech and should not be used for any other purpose outside the elaboration of reports that will be revised and approved by DevTech and USAID. The unauthorized use of this information will result in the cancelation of this subcontract.

In addition, to comply with USAID Standard regulation, the organization should ensure adherence to the following basic principles to protect the children involved in this study:

(1) Ensure compliance with Zambian child welfare and protection standards, in addition to any additional international agreement or regulations Zambia has signed, whichever provides the greatest protection, and with the law of the United States where applicable.
(2) It is prohibited to engage in child abuse, exploitation, or neglect.
(3) Consider the protection of children in all planning and implementation to determine if there are potential risks to the children that are associated with the activities and operation of the project, if applicable.
(4) Apply measures to reduce the risk of child abuse, exploitation or neglect, including, but limited to, limiting actions with children without proper supervision, prohibiting exposure to pornography, complying with all applicable laws, regulations, including those regulations pertaining to taking pictures, film or generating images any other images of children
(5) Promote child safety selection procedures for staff, especially those whose work puts them in direct contact with children.
(6) Have (demonstrable) policies and procedures to ensure that staff and others have been trained on issues of child abuse, exploitation or neglect; making it mandatory for staff and others to report accusations; investigate and administer accusations; and take appropriate action in response to such accusations, including, but not limited to, firing said personnel.

The selected personal will receive, as part of the EGRA training, a session on sexual harassment and the appropriate procedures for dealing with cases of violence and / or trafficking by the Master Trainers under Education Data activity.

XI. USAID REGULATIONS

The entity will ensure that all work activities conducted under this contract towards the successful completion of this scope of work is completed in accordance with all applicable USAID and USG regulations, including but not limited to, FAR and AIDAR.

XII. PENALTIES

This subcontract may be suspended for cause, at any time, in whole or in part, by DevTech by written notification to the organization, provided it is determined that the organization has not complied with the conditions of the contract. If, for reasons attributable to it, the organization incurs a delay with respect to the established deadlines and the reports to be submitted, so that it rationally presumes the impossibility of complying with the final deadline or if it is not complied with, DevTech may opt interchangeably for the resolution of the contract.

XIII. TECHNICAL SUPERVISOR

The technical supervisors for this contract will be the Program Manager / Team Lead and the Home Office Program Manager.

XIV. CONFIDENTIAL INFORMATION

If selected for this subcontract with DevTech Systems, Inc. (DevTech), the local survey firm or institution will be expected to sign a non-disclosure agreement that recognizes the highly sensitive nature of proprietary information, as well as the competitive nature of DevTech's business, and understand the importance of protecting confidential, sensitive and / or information. patented by the firm and its client. Specifically, this includes, but is not limited to, the Client: USAID / Zambia Education Data activity, contract number 72061118C00005 under IDIQ AID-QAA-1-14-00057-ABE ACR.

By submitting a proposal under this Terms of Reference, the local survey firm or institution agrees to treat all non-public confidential information, including confidential and acquisition or proposed information, with the strictest confidentiality. The local survey firm or institution agrees not disclose DevTech or customer confidential information to any person for my own purposes or for purposes other than those of DevTech Systems, Inc., unless they have first obtained in writing the prior consent of the DevTech Senior Corporate Management or Disclosure of information as required by the court order or regulatory body.

If selected, the local survey firm or institutions will be obligated under the confidentiality agreement which will remain in effect until the date DevTech or its customers publicly disclose confidential information. If selected for this subcontract, the local survey firm or institution will be required to agree that, at DevTech's request or upon termination of the subcontract with DevTech, they will immediately return all materials, in all formats, received and created as a result of the subcontract directly to the DevTech Agreement Coordinator or a member of Senior Corporate Management.

XV. RESPONSE SUBMISSION

All interested parties should submit a complete response to the terms of reference that include a proposal of the following two components:

Component I: Technical Proposal

(1) Cover Sheet with contact information and DUNS number
(2) Organizational profile
(3) Statement of interest in the scope of work.
(4) Description of the applicable organizational capabilities similar to activities carried out by the organization, including past experience under USAID contracts
(5) Technical approach that outlines your recruitment, training, and data collection plan in alignment with the scope of work. It should also include a detailed timeline for each activity as well as critical assumptions, risks, and mitigation strategies. Please also include a section to respond to the optional activities proposed in Section VIII
(6) Management structure of proposed staff members with accompanying CVs (maximum of 2 pages per CV)
(7) Contact information for three recent client references

The Technical Proposal should not exceed 15 pages in length, excluding CVs and any annexes.

Component II: Cost Proposal

(1) Cover Sheet with contact information and DUNS number
(2) Two accompanying budgets: (1) for all Midline EGRA activities conducted in the five target provinces without the optional activities in section VIII and (2) for all Midline EGRA activities conducted in the five target provinces in addition to the optional activities listed in Section VIII to assess schools from the additional five provinces. Both budgets should include individual daily rates for the key personal outlined in section VI.
(3) Budget narrative to provide details on the costs provided
(4) Audited financial records from the previous three calendar years which will be submitted to USAID to support the Request for Subcontracting Application.
(5) Completed Section K
(6) Completed Certification of Trafficking in Persons
(7) Completed Evidence of Responsibility
(8) Indirect Cost Rate information, if applying indirect cost rates
(9) Work week information

All questions regarding these terms of reference should be submitted to Education Data activity no later than May 4, 2020. Education Data activity will respond to all questions within 5 business days.

All final submissions of responses to the terms of reference must be sent to Education Data activity staff by May 18, 2020.

Both questions and submissions should be sent to the following email address: **Ed-data@devtechsys.com**

Please note: The selected local survey firm and resulting contract is subject to USAID Contracting Officer approval and may be cancelled at any time for cause, convenience or due to changed circumstances.

XVI.   TECHNICAL REVIEW CRITERIA

Proposals for the term of reference will be evaluated against the following criteria and weights:

1. Previous experience conducting nationwide assessments in the area of education, specifically primary school, and literacy (20%)
2. Quality and service methodology, including realistic timeframes, technically sound and comprehensive approaches encompassing all requirements outlines in the terms of reference, alignment to Zambian context, and quality control processes to assess and mitigate risks and challenges (25%)
3. Experience and ability of proposed staff according descriptions in *Section VI. Professional Profile* (20%)
4. Costs are based on competitive market research and all requirements that incur costs outlined in the terms of reference (25%)
5. Delivery date based on planning, allotted timeframes to complete deliverables and tasks, and consideration of high volumes of work and/or simultaneous deadlines (10%)

XVII. ACCOMPANYING DOCUMENTS

Please review the accompanying documents listed below and submit the required information along with your technical proposal.

1. Budget Template
2. Contract Clauses
3. Certification of Trafficking in Persons
4. Evidence of Responsibility
5. Indirect Rate
6. Information Concerning Work Week
7. Section K

XVIII. REFERENCE DOCUMENTS

Additional documents for reference may be accessed through the Development Experience Clearinghouse (DEC) by clicking on the links included below or will be attached.

1. [USAID Education Data activity: Language Mapping Exercise Report](#)
2. [USAID/Zambia Education Data activity: Early-Grade Reading Assessment in Five Target Provinces, 2018 Baseline Report](#)
3. [USAID Education Data activity: Transition Strategy](#)