

Terms of Reference (ToR)

Recruitment of a Research Consultancy Firm for Data Collection – PSE & IBBS Survey 2025

Background

The Integrated Biological and Behavioral Surveillance (IBBS) is a key source of information for understanding risk behaviors, program coverage, and the prevalence of HIV, sexually transmitted infections (STIs), and hepatitis among key populations at higher risk of HIV. It plays a vital role in informing national programming and strategic planning. IBBS findings also contribute to the national HIV surveillance system, Global AIDS Monitoring (GAM) submissions, and the modeling of HIV estimates and projections. Conducted every three to five years, IBBS surveys are essential for monitoring trends in HIV prevalence, knowledge, risk and protective behaviors, and access to services.

In Sri Lanka, HIV surveillance surveys among key populations have been conducted every two years from 1990 to 2019. The first behavioral surveillance survey, which did not include biological testing, was carried out in 2006. Population size estimation for key populations was conducted in 2013 using mapping methodologies. Two rounds of IBBS surveys were completed in 2015 and 2018, both utilizing Respondent-Driven Sampling (RDS).

In line with the National Strategic Plan for HIV/STI 2023–2027, the third round of the IBBS was initially scheduled for 2023 but has been rescheduled to 2025. The implementation of the IBBS and Population Size Estimation (PSE) will be led by the National STD/AIDS Control Programme (NSACP), with support from NGOs and other stakeholders, and with financial and technical assistance from the Global Fund, SKPA and UNAIDS. The protocol, questionnaires, and other relevant documents for the IBBS and PSE were developed by the international consultant, Dr. Lisa G. Johnston, an Epidemiologist and Senior Consultant (2000–present), who has provided consultancy services for several international organizations, including the Centers for Disease Control and Prevention (CDC), universities, UNDP, UNODC, UNICEF, USAID, UNAIDS, the Global Fund, and the World Health Organization (WHO). She will also be responsible for data cleaning, analysis, report writing, and contributing to the dissemination of findings. Technical Advisory Committee (TAC) for the IBBS and PSE has been established and has reviewed the protocol and survey instruments. The TAC will provide oversight on quality assurance and control during the implementation phase, review progress reports, and offer recommendations for the final report, among other responsibilities.

This study adopts a mixed-methods approach, beginning with rapid formative assessments through key informant interviews (KIIs) and focus group discussions (FGDs) with stakeholders and key populations across selected districts to optimize sampling strategies and survey logistics. The quantitative component employs Respondent Driven Sampling to systematically recruit participants from hidden and hard-to-reach populations, while the biological component includes HIV rapid testing, as well as Syphilis, Hepatitis B, and Hepatitis C testing, complemented by pre- and post-test counseling and referral to care. The survey aims to achieve statistically robust estimates, with district- and population-specific sample sizes determined based on population size estimates, feasibility, and available resources. The IBBS planned to be conducted in 2025/2026 in Sri Lanka aims to assess the prevalence of HIV, syphilis, hepatitis B, and hepatitis C, as well as related risk behaviors among female sex workers (FSWs), men who have sex with men (MSM), transgender women (TGW), people who inject drugs (PWID), and beach boys (BB). The survey will be conducted across six districts—Colombo, Galle, Kandy, Anuradhapura, Jaffna, and Kegalle—with a total size of 3,806 participants.

Data collection will be conducted at multiple urban and district sites, using standardized questionnaires incorporating Global AIDS Monitoring (GAM) indicators alongside locally relevant behavioral and demographic variables. To ensure high-quality implementation, the NSACP, together with the district Sexually Transmitted Disease (STD) clinic teams which is under the Provincial Directors of Health and Regional Directors of Health Services, will conduct frequent supervisory visits. The selected consultancy firm shall be responsible for converting the digital Excel questionnaires into a data entry tool (preferably using Kobo Toolbox), conducting interviews, and coordinating overall data collection activities in collaboration with the district STD clinic staff at the interview sites. The district STD clinics will provide support through designated coupon managers and nursing officers, while outreach workers in each district will serve as screeners. All of these personnel will undergo intensive training. The survey participants will be given suitable incentives to help maintain the RDS recruitment chains. Data will be collected electronically via smart phones provided by the NSACP to improve efficiency and minimize errors, with strict quality control measures applied to both biological testing and data entry. Daily monitoring of participant enrollment and coupon distribution will help ensure fair and accurate recruitment for population size estimation (PSE), multiple approaches will be applied, including multiplier methods (e.g., service and unique object multipliers), successive sampling PSE integrated with RDS data, and anchored

multipliers combined with density ranking, thereby generating more reliable district- and national-level estimates.

2. Purpose

The objective of this consultancy is to engage a qualified and experienced firm to ensure high-quality data collection for the Integrated Biological and Behavioral Surveillance (IBBS) Survey – 2025.

The selected firm will be responsible for;

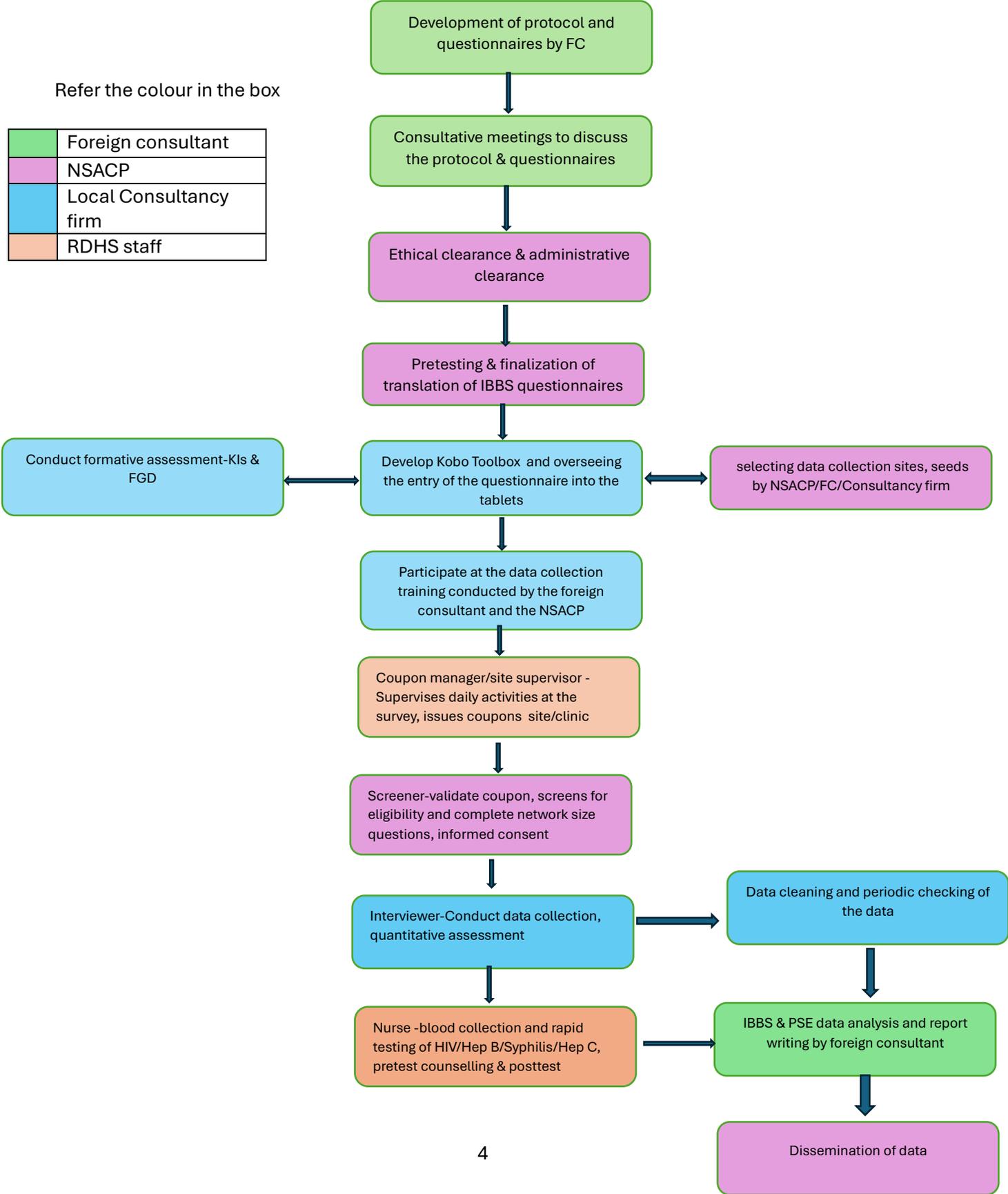
- Developing the Kobo Toolbox based on the existing digital excel questionnaires and the deployment of the questionnaire to a suitable tool.
- Conducting formative assessments, including Key Informant Interviews (KIIs) and Focus Group Discussions (FGDs), and providing transcription and translation in English.
- Performing data collection in the quantitative assessment in six districts simultaneously.
- Coordinate data collection activities across six districts, ensuring effective collaboration with data collection center staff, supported by the district STD clinics and the NSACP
- facilitating timely reporting in alignment with the approved IBBS 2025 protocol and implementation timeline.

This partnership aims to generate reliable data to inform national HIV prevention, treatment, and policy efforts under the Global Fund-supported programme.

Flow chart illustrating the steps and groups involved in IBBS and PSE, highlighting their overall responsibilities

Refer the colour in the box

	Foreign consultant
	NSACP
	Local Consultancy firm
	RDHS staff



3. Scope of work of the selected consultancy firm

The selected consultancy firm shall conduct formative assessments, including KIIs and FGDs with transcription and translation, and develop the Kobo Toolbox using existing Excel questionnaires for deployment on smartphones. The firm shall also carry out quantitative data collection, ensuring it is conducted simultaneously across all six districts. Additionally, the firm shall collaborate on data collection activities in all six districts with NSACP and the district STD clinic staff assigned to the data collection site, oversee data quality, and ensure timely reporting in accordance with the IBBS 2025 protocol and timeline.

- The selected firm (research coordinator, information technology specialist and all the interviewers) is expected to undergo the 4-day training programme on data collection conducted by the NSACP in collaboration with the foreign consultant.

The selected consultancy firm shall provide the following positions:

- **Research Team Coordinator**
- **Data Management Specialist (01)**
- **Interviewers for the qualitative assessment (Primary interviewer and note taker) (Sinhala speaking and Tamil speaking interviewers) [2 persons per district, (12 minimum)]**
- **Interviewers for the quantitative assessment (26) (Sinhala speaking and Tamil speaking interviewers)**

Research Team Coordinator- The person responsible overall on behalf of the Local consultancy firm

- Shall be responsible for conducting and completing the qualitative assessment (FGDs and KIIs) with the support of interviewers and providing the translated transcriptions to the NSACP within the given timeline. (the selection of key informants and key populations for the interviews will be coordinated by the NSACP)
- Shall be responsible for conducting and completing the data collection in quantitative assessment in all six districts simultaneously within the given timeline.
- shall be responsible for conducting site visits during the qualitative assessment and quantitative assessment
- shall collaborate with the NSACP and the coupon/sites' managers for survey logistics before & during data collection in six districts and data entry, monitoring participants recruitment

- ensuring that survey staff at each site adhere to approved ethical procedures in survey protocol as these relate to informed consent, data collection, storage, security, and backup, and biological specimen collection, storage, transport and safety.
- Providing periodic progress updates to the NSACP

Responsibilities of the Data Management Specialist

- Shall develop the Kobo Toolbox using existing Excel questionnaires for deployment on smartphones.
- Conduct pre-testing/pilot testing of the digital questionnaire on sample devices.
- Upload the final questionnaire to the Kobo server.
- Provide technical support for the Kobo Toolbox, including troubleshooting and resolving issues as they arise.
- Export raw datasets into analysis-ready formats (Excel, CSV, SPSS, Stata).
- Ensure data encryption, privacy, and compliance with ethical guidelines.
- Regularly back up collected data to prevent loss.
- Manage user permissions and access control.
- Generate progress reports on data collection status.
- Hand-over-cleaned datasets and the final Kobo Toolbox package to the client.

Responsibilities of the Interviewers in Formative Assessment:

- Shall perform Key Informant Interviews (KIIs) and Focus Group Discussions (FGDs) following the approved protocol within the timeline. (selection of key informants and key populations for the interviews will be coordinated by the NSACP)
- Ensure ethical standards are maintained, including obtaining informed consent from participants.
- Shall record responses, accurately including detailed notes and audio recordings if applicable.
- Facilitate smooth communication and create a comfortable environment for participants.
- Shall transcribe and translate interviews where required, maintaining confidentiality.
- Shall submit the completed transcriptions and recordings to the research coordinator within the time line.

Interviewers for quantitative assessment

The interviewer is responsible for:

- ensuring that smart phones are charged.

- conducting interviews and entering responses into the kobo tool.
- ensuring confidentiality of the interview.
- making relevant notes in the checklist forms.
- escorting participants to the blood sample collector.

Qualifications of Research Coordinator for IBBS Survey:

- **Educational Background:** A minimum of a bachelor’s degree such as Medicine, public health, Epidemiology, , Social Sciences, or a relevant related field; a master’s degree is desirable.
- **Experience:** At least 3–5 years of experience in coordinating research studies or surveys, preferably in HIV, STI, or behavioral health research. Previous experience in conducting research using Respondent Driven Sampling is desirable.
- **Management Skills:** Prior experience in coordinating multi-site data collection, and ensuring adherence to timelines
- **Communication Skills:** Excellent verbal and written communication, with the ability to liaise with stakeholders, field teams, and partner organizations.
- **Other:.** Prior experience working with key populations will be desirable.

Qualifications of Data Management Specialist for IBBS Survey:

- **Educational Background:** Degree/diploma in information technology, Computer Science, or a related field; postgraduate qualifications are an added advantage.
- **Experience:** Minimum of 1 year of professional experience in managing IT systems for research or large-scale surveys.
- **Technical Skills:** Proficiency in **Kobo Toolbox** (or similar digital data collection platforms), database management, data security, and troubleshooting hardware/software issues. Experience in developing and customizing digital questionnaires, configuring skip logic and validation checks, and deploying forms on tablets/mobile devices.
- **Other Skills:** Familiarity with research ethics, confidentiality standards, and secure data transfer, backup systems

Qualifications of Interviewers for Formative Assessment (IBBS):

- **Educational Background:** At least a diploma or bachelor’s degree in Social Sciences, Public Health, Nursing, or a related field.
- **Experience:** Prior experience in conducting qualitative interviews, FGDs, or community-based surveys is preferred.
- **Communication Skills:** Strong interpersonal and communication skills, with the ability to build rapport and conduct sensitive discussions in a respectful manner. Fluency in local languages relevant to the study areas;

- **Research Ethics:** Knowledge of informed consent, confidentiality, and ethical conduct in research involving human participants.
- **Other Skills:** Ability to work in diverse community settings, follow protocols accurately, and ensure timely submission of interview materials.

Qualifications of Interviewers for Quantitative Assessment (IBBS):

- **Educational Background:** Minimum of A/L qualification; a diploma or degree in Public Health, Social Sciences, Nursing, or a related field is desirable.
- **Experience:** Prior experience in conducting field surveys, structured interviews, or data collection using tablets/mobile devices is preferred.
- **Technical Skills:** Familiarity with digital data collection tools (e.g., Kobo Toolbox, ODK, Red CAP) is preferred
- **Communication Skills:** Strong communication skills and ability to engage respectfully with participants, explain study procedures clearly, and obtain informed consent. Fluency in local languages relevant to the study areas.
- **Research Ethics:** Awareness of confidentiality, informed consent, and ethical standards in health and behavioral surveys. Accuracy in recording responses and ability to follow protocols.

5. Deliverables

The selected consultancy firm will be required to deliver the following deliverables in alignment with the approved IBBS 2025 protocol and implementation plan:

1. Recruitment and deployment details of qualified personnel
 - Research Team Coordinator
 - Data management specialist (1)
 - Interviewers for qualitative/formative assessment [two from each districts (12)]
 - Interviewers for the quantitative assessment (26)
2. Variable dictionaries and a fully developed data entry tool (KoboToolbox) installed and configured on smartphones, with confirmed successful deployment and operational functionality.
3. Completion of training for all team members, including participation in a four-day training program organized by NSACP in collaboration with international consultants.
4. All transcriptions translated into English upon completion of all 23 Key Informant Interviews (KIIs) and 13 Focus Group Discussions (FGDs)
5. Participant recruitment statistics and Interviewer performance reports.
6. Data collection progress reports and district level updates should be submitted.

7. Database in standardized, cleaned, and analyzable formats (e.g., EXCEL.CSV, STATA, or SPSS)

Final summary report , overview of field implementation, summary of quantitative and qualitative data collection, number of interviews completed (for payment validation), team deployment records, Operational challenges and how they were resolved, lessons learned and recommendations for future rounds.

6. Payment Plan

Payments to the selected consultancy firm will be made based on satisfactory completion of deliverables, as verified by the NSACP and the IBBS Technical Advisory Committee. The payment plan is structured to ensure performance-based disbursement, aligned with key milestones in the implementation process. Inter-district travel related to supervisory duties of the research coordinators is included with in the estimated budget. The consultancy firm is expected to adopt a per-questionnaire payment model for interviewers, as the number of days required for data collection may vary.

Payment Schedule

Milestone	Deliverable(s)	Payment (%)
1 st milestone	Following the signing of the agreement and the submission of the recruitment and deployment details of qualified personnel, an advance payment shall be made	10%
2 nd milestone	Upon submission of variable dictionaries and data entry tools (Kobo Toolbox,) developed, reviewed and recommended by the Technical Advisory Committee	10%
3 rd milestone	Completion of all 23 KIIs and 13 FGDs, with transcriptions and English translations submitted and reviewed by the Technical Advisory Committee and recommended	10%
4 th milestone	<p>Upon completion of 25% of the quantitative data collection (based on the total sample size) covering <u>all six districts</u>. Completion of 25% of quantitative data collection should be verified by the NSACP and the , coverage of all six districts shall be considered prior to payment</p> <ul style="list-style-type: none"> • Progress reports from each district 	15%

Milestone	Deliverable(s)	Payment (%)
5 th milestone	Upon completion of 50% of the quantitative data collection (based on the total sample size) covering all six districts. Completion of 50% of quantitative data collection should be verified by the NSACP and the, coverage of all six districts shall be considered prior to payment •Progress reports from each district	15%
6 th milestone	Completion of quantitative data collection in all 6 districts (based on the total sample size). Completion of quantitative data collection should be verified by the NSACP and the, coverage of all six districts shall be considered prior to payment • Progress reports from each district	20%
Final payment	Upon submission of final summary report, as specified under deliverables. The final payment (20%) will be made only after all deliverables have been reviewed, approved, by the Technical Advisory Committee for IBBS and certified as complete by the NSACP Director.	20%

4. Duration

Activity	Timeline
1.Participation in the 4 day training conducted by the NSACP and the foreign consultant	4 days
2.Conducting 23 KIIs and 13 FGDs in six districts and to provide English translation of the transcription	2weeks
3. Development of variable dictionaries and data entry tool and piloting (Kobo Toolbox,)	2weeks
4. The consultancy firm is required to conduct data collection simultaneously across all six districts and complete the process within 3 to 4 weeks.	3-4weeks

8. Reporting and Supervision

The selected firm will report directly to the NSACP Director and collaborate with IBBS coordinator, STD clinics in the six districts and the IBBS Technical Advisory Committee.

8. Submission Requirements

Interested consultancy firms must submit the duly completed application form, available on the website, along with the required documents, either by post or by hand, on or before December 1st, 2025, at 4.00 p.m. The pre-bid meeting will be held on 25th November 2025 at 10.00 a.m. at the Family Planning Association of Sri Lanka, 37/27 Bullers Lane, Colombo 07.

The envelope should be clearly marked on the top left corner with “Selection of a Consultancy Firm for Data Collection in IBBS 2025” and addressed to:

**Executive Director,
The Family Planning Association of Sri Lanka,
37/27, Bullers Lane,
Colombo 07**

Required documents

- CVs of the proposed Research Coordinator, Data Management specialist, and sample interviewer profile.
- Organizational profile and previous experience in similar assignments.
- Proposed methodology and work plan for six districts with a timeline for deployment and deliverables.
- Detailed financial proposal (separately sealed).

10. Evaluation Criteria; Proposals will be evaluated based on:

Category	Evaluation Criteria	Weight (%)	Scoring Details
Technical proposal	<p>1.Team composition and qualifications</p> <p>Research coordinator- A minimum of a bachelor’s degree such as Medicine, public health, Epidemiology, Social Sciences, or a relevant related field; a master’s degree is preferred.</p> <p>Data Management Specialist- Bachelor’s degree/diploma in information technology, Computer Science, or a related field; post graduate degree is preferred</p> <p>Interviewers for formative assessment- At least a diploma or bachelor’s degree in social sciences, Public Health, Nursing, or a related field</p> <p>Interviewers for quantitative assessment- Minimum of A/L qualification; a diploma or bachelor’s degree in public health, Social Sciences, Nursing, or a related field is desirable</p>	70%	<p>bachelor’s degree-5, Master’s degree/above-10 (10max)</p> <p>bachelor’s degree-5, Master’s degree/above-10 (10max)</p> <p>0 or 5 marks (5 max)</p> <p>0 or 5 marks (5 max)</p>

	2. At least 3–5 years of experience in coordinating research studies or surveys, preferably in HIV, STI, or behavioral health research. Previous experience in conducting research using RDS is desirable		0 or 30 marks (30 max)
	3. Proven experience in working with key population		0-10 marks (10 max)
	4. Multi-site project management experience		0-10 marks (10 max)
	5. Methodology and Work plan		0-20marks (20max)
Financial proposal	<p>Formula: $S_f = 100 \times \frac{F_m}{F}$</p> <p>$S_f$ = Financial score for the proposal being evaluated</p> <p>F_m = Lowest price offered in any proposal</p> <p>F = Price of the proposal being evaluated</p>	30%	
Total combined score	<p>Formula:</p> $S = S_t \times T\% + S_f \times P\%$ <p>S = Total combined score</p> <p>S_t = Technical score</p> <p>$T\%$ = Weight given to the technical proposal</p> <p>S_f = Financial score</p> <p>$P\%$ = Weight given to the financial score</p>		

For further information or clarifications, please contact: **Dr Madhavi Gunathilake, Consultant Community Physician, Epidemiology Unit, National STD/AIDS Control Programme** via phone: **0112667163/0112667029 Ext.407** or email: **nsacpepidunit@gmail.com**