

Hiring a Survey Firm to Conduct the Technical Needs Assessment Survey for EAII's India Safe Water Program in Odisha

RFP Ref. No. EAII/ISW/2026/IM-002

EAII ADVISORS PRIVATE LIMITED

March 2026

Table of Contents

1. INTRODUCTION TO EVIDENCE ACTION & EAI ADVISORS	3
2. BACKGROUND	3
3. RFP TIMELINES	3
4. BROAD SCOPE OF WORK	4
5. ROLES & RESPONSIBILITIES OF THE SURVEY AGENCY	4
6. TECHNICAL AND FINANCIAL SCORING CRITERIA	14
7. TERMS AND CONDITIONS	15
8. ANNEXURES	17
ANNEXURE A: Checklist of Documents to be Submitted by the Bidder	17
ANNEXURE B: Financial Proposal Template	20
ANNEXURE C: Format of Non-Blacklisting Certificate	21
ANNEXURE D: Deliverables, Timelines, and Payment Schedule	22

1. INTRODUCTION TO EVIDENCE ACTION & EAI ADVISORS

Evidence Action aims to be a world leader in scaling evidence-based and cost-effective programs to reduce the burden of poverty for hundreds of millions of people in the poorest places. To date, Evidence Action has a presence across 7 countries, including India. Evidence Action's programs have been recognized by GiveWell, the Skoll Foundation, the Life You Can Save, Giving What We Can, and covered in the Economist, NPR, and the New York Times.

In India, EAI Advisors Private Limited (EAI) – as Evidence Action's technical implementing partner – currently provides technical assistance to select state government's Ministries of Health, Education, and Women and Child Development to implement the school and *Anganwadi*-based National Deworming Day program and Iron and Folic Acid (IFA) supplementation program to improve children's health, education, and long-term development. Moving forward, EAI aims to expand to provide technical support to more state governments and on other public health & nutrition issues.

2. BACKGROUND

In 2019, the Government of India launched Jal Jeevan Mission (JJM) to provide safe tap water to every rural household in the country. JJM has made tremendous progress – in January 2026, around 15.8 crore households in the country had tap water connections, accomplishing a household-level coverage of approximately 82%.

EAI is supporting this Mission through its India Safe Water (ISW) program, water treatment facilities to existing water access infrastructure to enable governments to deliver substantial health benefits to communities at a low additional cost. Our water treatment initiatives in Andhra Pradesh, Madhya Pradesh, and Rajasthan apply insights from our safe water initiatives in Africa to expand chlorination access in India's rural communities. Our goal is to identify the most effective methods for deploying in-line chlorination (ILC) across various water systems, ultimately supporting state governments in scaling safe water access to millions in the coming years. EAI is now expanding its ISW program to Odisha, where it will provide technical assistance to the state government's Rural Water Supply and Sanitation (RWSS) department to support JJM's goal of ensuring safe drinking water through in-line chlorination.

To identify eligible locations and technologies for deploying chlorination facilities in the state, EAI is commissioning a Technical Needs Assessment (TNA) survey in Single Village Scheme (SVS) sites within 5-6 districts across Odisha. The overarching objective of the TNA is to assess site eligibility based on water source characteristics, infrastructure specifications, and operational parameters to determine suitability for ILC device installation.

3. RFP TIMELINES

Milestone	Date
RFP release date	March 31, 2026
Your intention to bid is due by	April 6, 2026
Pre-bid meeting	April 8, 2026

Milestone	Date
Your questions on the SOW are due by	April 10, 2026
Questions will be answered by EAll on or before	April 13, 2026
Proposal Submission via email by 5 pm IST	April 17, 2026
Presentations by shortlisted agencies	April 23-24, 2026
Final selection is scheduled for the week of	Week of May 4 , 2026

Note- Given the programmatic timelines, requests for timeline extensions will not be entertained.

All of the questions to the RFP and the answers will be shared with every vendor that submits an intention to bid. All communication, including the proposals should be sent to procurement@eaiiadvisors.in Please mention in the subject line the title of the RFP as captured on the cover page.

4. BROAD SCOPE OF WORK

As part of its technical assistance to the state government of Odisha, EAll seeks competitive bids from survey firms for data collection services pertaining to the Technical Needs Assessment of potential SVS sites for ILC device installation. This Request for Proposal (RFP) describes the proposed assessment activities in detail, outlines key responsibilities of the selected survey firm, and RFP submission requirements.

Broadly, the contracted survey firm will handle enumerator recruitment and selection, ensuring the team has qualified field personnel with experience in technical infrastructure assessments. The firm will need to develop training materials and conduct training sessions for both supervisors and surveyors. The agency will also manage all survey execution and logistics – including liaising with local authorities and respondents to ensure smooth site access. The survey firm will also establish and implement a comprehensive data quality assurance protocol – through back-checks and spot-checks – throughout the survey period. The agency will review progress, address challenges, and incorporate learnings across the survey team, keeping the EAll team apprised of all notable developments over the engagement period. Additionally, the firm will conduct data quality reviews and monitoring, share periodic progress reports with EAll, identify and resolve quality issues, and carry out comprehensive data cleaning.

The roles and responsibilities of the survey are further detailed in the subsequent sections.

5. ROLES & RESPONSIBILITIES OF THE SURVEY AGENCY

This section sets out what is expected of the Survey Agency in executing the TNA survey, covering the overall scope and objectives of the survey, the specific activities the Agency is expected to carry out along with the standards it must adhere to, the team composition and staffing requirements for field deployment, and the quality assurance protocols the Agency must follow to ensure data reliability and completeness.

5.1. Survey Overview

The agency is expected to complete surveys at all 400 TNA sites and 400 households across 50 sites (8 HHs per site), selected from within the TNA survey sites as identified by EAll within 5-6 districts of Odisha. If a site cannot be surveyed due to ground-level constraints – such as a non-functional water system, site inaccessibility, or unavailability of key respondents despite repeated attempts – the agency shall report the issue to EAll immediately. A replacement site will be identified by EAll, ensuring that the total target of TNA and household surveys is met. No site shall be dropped or substituted without prior written approval from EAll. The tables below provide an overview of the two survey components – the TNA Survey and the Household Survey – including their scope, respondent categories, and key content areas:

Overview of Surveys		
Description	TNA Survey	Household Survey
Sample Size	400 SVS sites across 5-6 districts	400 households (50 SVS sites [#] × 8 HHs) across 5-6 districts
Survey Level	Water system level	Household level
Respondent Category	Group survey with water system valve operators, GP representative (either secretary or sarpanch), and the concerned RWSS engineer	The adult HH member most knowledgeable about water practices
Survey Length	30–45 minutes	20 minutes

[#]Household surveys will be conducted in a sub-set of 50 sites selected from the 400 SVS sites where the TNA survey is being carried out. The sites where the household surveys are to be conducted will be identified by EAll and shared with the survey agency.

Key Areas Covered – TNA Surveys	
Area	Details
Basic System Details	System name, GPS coordinates, valve operator details
Water Source	Type, reported turbidity, contamination concerns (non-microbial)
Infrastructure	Tank type and size, inlet/pump details, system-level treatment, tap counts (household and community)
Operations	Tank filling and distribution patterns, reported operational challenges
Community Use	Reported drinking water use, experience with chlorination
Alternative Sources	Alternative drinking water sources available in community, along with reported prevalence of certain sources (handpumps, personal borewell/tubewell)

Key Areas Covered – Household Surveys	
Area	Details
Household Water Use	Tap access, drinking water sources, use of reference water system, source preferences
Water Treatment Practices	Awareness and practices around water treatment, including chlorination
Chlorine Residual Testing	FCR/TCR testing of household drinking water, with contextual information on source, storage, and treatment

Note: The key survey areas listed above are indicative. The final survey instruments will be developed and shared by EAll at the start of the engagement

In addition to the TNA and Household surveys, the agency shall collect water samples for Water Quality Tests from 115 SVS sites, spread across the 5-6 districts, over the course of the fieldwork. EAll will provide a list of sites for the collection of water samples, along with detailed instructions on the logistics of the sample collection (including requisite equipment, water source, collection, packaging, handling, and further despatch) to ensure that the samples reach the external institution for water quality testing in a proper and timely manner.

5.2. Survey Activities and Standards

The survey engagement is divided into three phases: pre-survey, survey, and post-survey. The pre-survey phase covers all preparatory work, including recruitment, training content preparation, surveyor training, and pilot testing. The survey phase involves actual data collection with daily supervision and quality monitoring. The post-survey phase includes final data cleaning, validation, and submission of complete datasets and reports. The sections below describe what the agency is responsible for during each phase and the standards they need to maintain throughout the work.

PRE-SURVEY PHASE	ACTIVITIES
Tool Translation & Review	1. Agency will translate all survey questions and response options to Odia. Local language is essential for respondent comprehension. The translation must be carried out by individuals proficient in Odia and familiar with local terminology, and should not rely solely on automated translation tools such as Google Translate. 2. Review the programmed tool shared by EAIL for: skip pattern accuracy, validation rules, GPS capture, photo functionality, data export, data structure formats. Document and share issues with EAIL.
Hiring Surveyors and Supervisors	1. Agency will hire a team of qualified surveyors and supervisors based on the desired qualifications as mentioned under sub-section 5.3. The proposed teams should be adequate to complete the survey on time as per the agreed timeline after consultation with EAIL. The rationale for the proposed team size and composition should be detailed in the Technical Proposal submitted by the bidders.
Development of Training Content & Materials	1. Training Content Development: Agency shall develop comprehensive training content in English and Odia covering: a. ISW program overview and key concepts pertaining to water infrastructure and the TNA, b. Survey tool walkthrough (section-wise explanation, skip logic, SurveyCTO navigation), c. Water infrastructure identification (OHT/GLR/GLSR types, materials, measurement techniques, inlet/outlet configuration), d. SOP for enumerators (pre-survey preparation, community entry, survey administration, end of day procedures), e. GPS capture and photo documentation procedures, data quality standards and common errors, ethical protocols (informed consent, confidentiality, professional conduct), f. Do's and don'ts guidelines for enumerators ensuring an error-free quality data collection, including testing of FCR (Free Chlorine Residual) and TCR (Total Chlorine Residual) using prescribed devices.

PRE-SURVEY PHASE	ACTIVITIES
	g. Prepare training manuals for enumerators and supervisors. 2. The agency is responsible for content development, design, Odia translation, printing, and preparation of sufficient physical copies for all participants. This includes materials preparation covering field guides, laminated quick reference cards for field use, photo guides for infrastructure identification with visual examples, and training presentations.
Data Collection Training	1. Training for enumerators and supervisors will be organized including field exposure: instruction, hands-on CAPI practice, role-play exercises, assessment. 2. Agency should share the list of surveyors and supervisors with EAll at least seven days before training begins. 3. The agency will arrange all logistics including venue, training halls, projectors, whiteboards, internet, markers, accommodation, food, and vehicles for field practice. 4. Final selection of surveyors and supervisors will be based on their performance during training with pre- and post-tests and in consultation with EAll team. 5. The agency will undertake evaluations to assess if surveyors and supervisors have understood the key concepts, and use the results to decide who is ready for deployment, who needs extra training, and who can serve as backups. The agency must provide a final list of test scores to EAll and receive written approval before data collection begins. 6. The agency will finalize the detailed data collection plan/field route plan (daily site allocations, district-wise timeline) and share at least five days before data collection. Any deviations require prior written approval from EAll.
Field Practice	1. Following the completion of the survey training, the agency shall carry out a dedicated field practice exercise in 10 non-sample sites in Odisha selected by EAll. The primary objective of the field practice is to a. Strengthen the surveyors' and supervisors' comprehension of the survey tool. b. Familiarise them with the local context and field conditions before the commencement of actual data collection. c. Build confidence in administering the survey instrument and identify any knowledge gaps or areas requiring further clarification before deployment. d. Accurately checking TCR and FCR in water samples and recording responses. 2. The agency will conduct the practice survey using its own logistics and resources.

PRE-SURVEY PHASE	ACTIVITIES
Field Team Equipment Requirements	1. The agency must provide tablets (not mobile phones or personal devices) with adequate battery life and performance for all enumerators, supporting SurveyCTO, GPS, and camera functions. 2. The agency will also procure and train surveyors and supervisors on Hanna Free Chlorine Checker (HC - HI701) and Total Chlorine Checker (HC - HI711) devices. 3. EAll will provide a government authorization letter for the TNA survey; enumerators and supervisors must carry it during the survey.

SURVEY PHASE	ACTIVITIES
Data Collection	1. Locate assigned SVS sites as per the sample sheet provided by EAll. 2. Liaise with Gram Panchayat, Valve operator, Sarpanch, or local leaders. Contact them at least 1-2 days before undertaking the survey and ask them about their availability. Explain survey purpose and show TNA authorization letter provided by EAll. 3. Identify appropriate respondent per protocol: Jalasathi/Pump Operator/VWSC member/GP Secretary/RWSS Engineer and Adult member of the household most knowledgeable about household water practices. 4. Upload all completed surveys to the SurveyCTO server on the same day as the completion of the surveys. Surveyors should verify successful submission and report any upload failures immediately to their supervisors. 5. If sample replacements are required, follow the replacement protocol outlined by EAll. Document reasons for replacement. Report replacements on the same day. 6. The agency must maintain a survey tracker/dashboard, with daily updates, progress updates to be periodically shared with EAll.

SURVEY PHASE	ACTIVITIES
Data Processing and Quality Assurance	1. Quality checks to be undertaken during the data collection phase, covering: a. Supervisor spot-checks: Supervisors accompany surveyors for 15% of surveys. Observe enumerator technique. Verify data accuracy in real-time and feedback to the surveyors should also be provided based on these observations. b. Back-checks: Conduct independent back-check surveys in the CAPI questionnaire as per EAI for a minimum 10% of completed sites which should not be concentrated. Compare with the main survey data and share output with EAI. c. Back checks including the variance report, should be shared twice a week for the first two weeks, and on a weekly basis thereafter for the remaining duration of the survey. 2. Data analysts must conduct high-frequency data quality checks throughout the data collection period. An indicative list of checks are specified below. The bidding agencies are strongly encouraged to propose additional checks and a comprehensive HF data quality monitoring framework as part of the Methodology section of their Technical Proposal. <i>Suggested daily HF checks (illustrative):</i> a. Survey completeness verification b. GPS validation (coordinates falling within expected village boundary) c. Photo quality review d. Response consistency checks e. Survey duration analysis Agencies should describe the tools they propose to use (e.g., SPSS, Stata, or other platforms) for conducting these checks. Outputs of HF checks should be shared twice a week for the first two weeks and every week thereafter for the remainder of the survey. 3. Identify and investigate data quality issues from HF checks, spot-checks, back-checks. 4. Implement corrective actions: Re-training of specific enumerators, clarification of protocols, enhanced supervision for problem areas. 5. Track individual enumerator metrics: Completion rates, survey duration, Quality metrics (skipping pattern for any surveyor, start and end times for fieldwork, anomalies in Discrepancies between raw data and back check data etc.)

SURVEY PHASE	ACTIVITIES
	6. Re-collect data for rejected surveys or sites with poor quality data (more than 50% variance in raw and back check data, more outliers with respect to any surveyor/team or location,etc.). No additional cost to EAll for quality-related re-work.

POST-SURVEY PHASE	ACTIVITIES
Rolling Data Submission	1. Submit raw and cleaned datasets to EAll twice a week for the first two weeks, then on a weekly basis. 2. Include data cleaning log in SPSS/Stata documenting all corrections made.
Final Data Submission	1. The agency shall submit both the raw datasets and the final cleaned datasets to EAll. All cleaned datasets must be prepared using SPSS or Stata and shared in .csv format, with all variables and values appropriately labelled. 2. All data cleaning must be carried out exclusively through do-files (Stata) or syntax files (SPSS). No modifications shall be made directly to the raw data files. The do-files/syntax files must be well-documented with proper labels, detailing each cleaning action undertaken and the person responsible. 3. After each round of cleaning, the agency shall submit a cleaning report to EAll, documenting all changes made, including variables modified, values changed (from and to), records dropped, and the rationale for each action. This report shall serve as a complete audit trail of all cleaning decisions. 4. The agency must incorporate all feedback provided by EAll on the submitted datasets and resubmit revised data within three working days of receiving such feedback.

5.3. Desired Team Structure

The agency is expected to deploy a well-structured and adequately staffed team to ensure the timely and high-quality execution of the data collection activities. At a minimum, the team should comprise a **Project Lead** to provide overall strategic direction and oversight; a **Project Manager / Master Trainer** to manage day-to-day operations, coordinate training, and oversee quality assurance; **Data Analyst(s)** to handle data processing, cleaning, and quality checks; a **State Field Manager** to coordinate and supervise field operations in Odisha; and a sufficient number of **Field Staff** (including Coordinators, Surveyors, and Supervisors) to carry out the surveys within the stipulated timelines and across the required geographies.

The expected qualifications and experience for each role have been outlined below.

Desirable profile for Project Lead:

- At least a Master's Degree in Economics / Statistics / Management / Public Health / any other Social Sciences
- Extensive experience of leading social research projects
- Basic understanding of the social sector domain specifically WASH, Health & Nutrition.
- Proficiency with statistical tools like Stata/SPSS/Excel

Required profile for Project Manager and / Survey Trainers:

- Master's Degree in Economics / Statistics / Management / Public Health / other Social Sciences
- Extensive experience of executing social research projects
- Good communication skills with strong experience of training data collectors
- Basic understanding of the social sector domain specifically WASH, Health & Nutrition.
- Proficiency with statistical tools like Stata / SPSS
- Strong understanding of the quality assurance mechanism for primary data collection.

Required Profile of Data Analysts:

- Master's / Bachelor's Degree in Economics / Statistics / Management / Public Health / any other Social Sciences / Other disciplines
- Relevant experience in the data management and research
- Basic understanding of the social sector domain specifically WASH, Health & Nutrition.
- Proficiency with statistical tools like Stata / SPSS. Having expertise in writing do files in Stata would be an added advantage

Required Profile of State Field Manager:

- Master's / Bachelor's Degree in Economics / Statistics / Management / Public Health / any other Social Sciences / Other disciplines
- Relevant work experience in the data collection and research
- Basic understanding of social survey's primary data collection method
- Basic understanding of CAPI-based data collection and quality checks on the survey data

Required Profile of Field Staff (Field Coordinators, Surveyors and Supervisors):

Selected surveyors and supervisors in each state should have the following qualification & experience:

- Should be at least 21 years of age

- Be university graduates
- Must have at least three years' experience in survey work, especially in carrying out CAPI-based surveys

The resumes of all hired surveyors and supervisors will be required to be shared with EAll for verification at least 7 working days in advance of the training for the surveys. Recruited field teams not matching with the above profile and laid down qualification criteria will not be allowed to participate in any training and in the surveys. Also, any field team members who have not undergone the prescribed training will not be allowed for any fieldwork. Any such untrained field team members found in the field will result in the cancellation of the completed interviews and the selected survey agency will be responsible to make up for the time-loss for the non-compliance.

5.4. Quality Assurance

Survey Monitoring and Supervision

The agency must implement at least a two-tier monitoring and supervision mechanism to maintain data quality, with Supervisors for field-level quality checks and enumerator support, and District / State Coordinators for overall team coordination and process oversight. Supervisors will ensure data quality through their supervision and monitoring efforts and provide support whenever needed. District / State Coordinators will coordinate the field team and oversee the data collection process.

Roles and Responsibilities of the Agency to Ensure Data Quality

The agency will carry overall responsibility for field monitoring and data quality assurance. The EAll team will also oversee the field survey to ensure data quality. The feedback provided by EAll must be incorporated. Any issues pertaining to sub-standard data must be addressed by the agency in accordance with EAll's guidance and within the stipulated timeline. The agency would be responsible for loss, damage, manipulation of data, or poor quality data; fresh data will be re-collected by the agency without any additional cost from EAll. The final data submission should be vetted by the agency's project lead for accuracy and quality.

Review Meetings by EAll

The agency will set up regular review meetings with the EAll team. During the Data Collection phase, meetings will be held twice a week for the first two weeks, transitioning to weekly meetings thereafter, covering data collection progress, dashboard, data quality issues from spot-checks, back-checks, variance reports, and high-frequency checks, and any operational challenges. Whereas post data collection phase review meetings will cover data cleaning status, validation findings, and deliverable submission timelines. All logistical arrangements for these meetings must be made by the agency.

Coordination & Communication

The agency must maintain proactive and transparent communication with EAll throughout the engagement. Agency leadership must attend all mandatory check-in calls with the EAll team. The agency must strictly adhere to all agreed deadlines while remaining adaptable to changes in data collection plans, timelines, and field locations. Anticipated delays must be proactively flagged with proposed mitigations. All field challenges-such as weather impacts, infrastructure issues, or community resistance-must be documented

with applied solutions and promptly escalated to EAll, who will handle matters requiring government coordination. Additionally, the agency must submit comprehensive weekly progress reports detailing planned versus actual site visits, data collection status, quality metrics, resolved issues, and the strategy for the upcoming week.

Engagement Activities	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10
Phase I: Preparatory and Pre-Survey Phase										
Signing of Contract and Engagement Inception										
Developing Contextual Understanding and Data Collection Preparation										
Hiring of Surveyors and Supervisors										
Development of Training Content and Materials										
Surveyor and Supervisor Training										
Phase II: Survey Phase										
Data Collection										
Data Processing and Quality Assurance										
Phase III: Post-Survey Phase										
Data Cleaning and Ongoing Data Submission										
Finalisation of Cleaned Data, incorporating EAll Feedback										

6. TECHNICAL AND FINANCIAL SCORING CRITERIA

Bidders will be evaluated by a panel of scorers based on the criteria listed below. Evaluation criteria 1-3 are technical components which will have 70% weightage in scoring; the remaining 30% will come from assessment of the Financial Proposal. Further information on the exact items required in the submission can be found in **Annexure A**.

S. No.	Parameter	Max Marks	Criteria
Technical Parameters			
1	Demonstrated experience in community data collection, household data collection, WASH programming data collection, and/or water quality/chlorine testing data collection	25	- Bidders must demonstrate experience in at least 1 of the data collection categories outlined. Extra points will be awarded for specific experience in WASH and/or water quality data collection. - Provision of at least three recent references related to work similar to the SOW.
2	Organizational capacity to mobilize and retain resources needed to execute the SOW	20	- Demonstrated management capacity to execute the SOW. - Description of experience/plan for recruiting and retaining experienced data collection team members. - Description of existing assets/supplies to be leveraged, or plans to procure key required items.

S. No.	Parameter	Max Marks	Criteria
3	Proposed methodology for executing and managing the SOW	25	Methodology addresses all aspects, including staffing structure (for field and non-field roles), plans for team training and retraining, coordination approaches, and data quality assurance protocols
Financial Parameters			
4	Financial Proposal	30	- Cost structure is clearly defined and it should be aligned as per the shared Financial proposal template in Annexure B below. - Financial proposal is proportionate to the services offered in the Technical Proposal - Budget assumptions are reasonable for context and the SOW outlined (e.g. unit rates, team allocation) - The bidder's annual turnover must be not less than INR 1.5 Crore (FY 2022-23, FY 2023-24 and FY 2024-25)

7. TERMS AND CONDITIONS

1. The RFP is an invitation to offer and does not commit EAll to accept any of the quotations received or award the contract to any bidders, including but not limited to the lowest bidder. For these purposes, EAll will assess the financial and technical proposals on the basis of the criteria stated above.
2. EAll is entitled to rely on the bidder's proposal and information provided by the bidder. In submitting a proposal and communicating with EAll, each bidder must ensure that the information it provides is true, accurate, complete, not misleading, and does not contain any intellectual property that breaches a third party's rights.
3. Please note that while EAll is entitled to rely on the financial and technical information provided by the bidder in its proposal, the final level of effort, scope of work, budget, and pricing will exclusively be set forth in a contract agreement that may, at EAll's sole discretion, be negotiated with and awarded to, a selected bidder/vendor.
4. Vendors must be willing to negotiate a contract with EAll in good faith and in a prompt, efficient, and cooperative manner.
5. By submitting a proposal, the vendor agrees to EAll's vendor contract included in Appendix A in this RFP document. Please note that the terms outlined in Appendix A are minimum required terms, and EAll reserves the right to modify such terms, in whole or in part, at any time before any final contract execution.
6. The successful vendor should not make any reference to EAll in any literature, promotional material, or sales presentation without prior written consent from EAll's Country Director.
7. EAll may make any inquiries about the individual's or organization's abilities to satisfy the RFP requirements and perform the work.

8. This RFP is not an offer to enter into an agreement with any party. Rather, it is a request to receive proposals from respondents interested in providing the services specified herein. EAll reserves the right to reject any or all quotations submitted and contract in the best interests of EAll.
9. EAll is not responsible for any costs or damages associated with the bidder's response, including copyright or other rights, regardless of the award or rejection of a quotation, or cancellation of this RFP. Consortia will not be permitted for this engagement; only individual firms or organisations may submit proposals.

8. ANNEXURES

ANNEXURE A: Checklist of Documents to be Submitted by the Bidder

The technical proposal should include:

Section A: Understanding of the survey objectives and design *(Not more than 2 pages)*

1. Describe the survey objective and work plan.

Section B: Operational approach *(Not more than 10 pages)*

1. **Preparation:** Describe the preparation activities the agency will undertake – including the hiring of quality and experienced data collectors, development of training materials and field manuals, and any other tools to enable high-quality data collection.
2. **Understanding of Local Context:** Describe any contextual considerations that must be made in order to carry the surveys to the target respondents effectively. Additionally, describe the agency's approach to managing these issues. Considerations may include but are not limited to language of the survey, timing of data collection activities, and selection criteria for interviewers.
3. **Staffing and Team Composition:** Describe the staff that will be working on this project, the recruitment method for hiring as per the desired roles mentioned under sub-section 5.4, number of staff needed to complete the project, roles and relevant experience, and whether they will be working on this project full-time or part-time.
3. **Equipment:** Data will be collected electronically using Android tablets and also, for Household level surveys, surveyors will require FCR and TCR measuring Hanna devices, the agency will be required to provide tablets and Hanna measuring devices ([HC - HI701](#) & [HC - HI711](#)) for all data collectors. Describe the equipment procurement and usage plan that the agency would be able to provide.
4. **Training:** Describe the training program your agency will design and deliver to prepare the data collection team for this survey. We are looking for a detailed and specific response that reflects your agency's experience – not a generic outline. Your response should cover the training design, duration, format, and who will lead the sessions. Explain how enumerators will be trained on the survey tools, including question walkthroughs, skip patterns, and use of the data collection platform. If refresher or on-the-job training is part of your approach, describe when and how it will be delivered. Where relevant, share examples from past surveys where your training approach directly contributed to data quality or helped navigate difficult field conditions. *(This section should cover 1-2 pages)*
5. **Data Collection Plan:** Describe the logistical plan for data collection. Include how teams will travel to and around enumeration areas, how many teams and team members will be deployed, how teams will be managed and coordinated and how data will be uploaded on a daily basis. *(This section should cover 2 pages)*
6. **Data Quality and Quality Assurance Mechanisms:** Describe the approach to ensure data quality over the course of the data collection, including monitoring of interview and surveyor quality. Cover how spot-checks, back-checks, and high-frequency checks will be implemented – including frequency, who conducts them, and how findings will drive field corrections. Explain how supervisors monitor enumerator performance in real-time and what actions are taken when issues are identified. Where

possible, share examples from past surveys where your QA mechanisms caught and corrected problems during data collection. *(This section should cover 2-3 pages)*

7. **Surveyor/Supervisor Replacement Protocol:** In the event of persistent data quality issues, despite documented corrective actions such as refresher training, increased back-checks, and direct supervisory intervention, agency must have a protocol in place for replacing the concerned surveyor(s) or supervisor(s) without disruption to the data collection timeline. The agency should describe this protocol in their Technical Proposal, including the criteria that would trigger a replacement decision, the timeline within which a replacement would be mobilized, and how continuity of quality standards will be ensured during the transition. EAIL reserves the right to request replacement of any field staff member whose work persistently fails to meet the agreed quality benchmarks.
8. **Data Cleaning:** Describe the process for cleaning and validating data after fieldwork is complete. Cover how inconsistencies, outliers, duplicates, and missing values are identified and resolved. Explain who is responsible, how the process is documented, and how the final dataset is validated before submission. If your agency uses standard protocols, scripts, or software for data cleaning, describe them briefly. *(This section should cover 1-2 pages)*
9. **Data Management and Confidentiality:** Describe how the agency will ensure compliance with any ethical guidelines, including how data will be kept confidential and secure during field work.

NOTE: The survey agency is not required to develop the data collection tools, program them onto the online software, or conduct data analysis.

Along with the technical proposal, the agency is required to provide the following information:

S. No.	Name of document	Format
1	Financial proposal	Budget for the engagement, using the detailed format provided by EAIL in Annexure B. Note: <i>Financial Proposal must be submitted as a separate file and should not be combined with or enclosed within the Technical Proposal document.</i>
2	Company registration	The bidder shall be a legal entity registered in India, in any one of the following forms: a Society registered under the Societies Registration Act, 1860; or a Public Trust registered under the Indian Trusts Act, 1882; or a company registered under Section 8 of the Companies Act, 2013; or a Private Limited Company incorporated under Section 2(68) of the Companies Act, 2013; or a Limited Liability Partnership (LLP) registered under the Limited Liability Partnership Act, 2008.
3	Contract of at least one project in the state of interest and state presence	Copy of contract/work order and work completion certificate for projects completed in Odisha, including but not limited to engagements with government institutions. Please note that only completed projects will be accepted; ongoing engagements will not be considered for review. The agency must have demonstrated capability to hire surveyors and supervisors, execute a large-scale survey, and conduct necessary quality assurance in the

S. No.	Name of document	Format
		state – this may take the form of a registered office in the state of Odisha (preferred), or existing team presence and prior experience in the state.
4	Tax registration and official ITR filing for last 3 years	ITR filing for year 2022-23, 2023-24, 2024-25 to be attached to the Technical Proposal
5	Certificate of incorporation, PAN number, and GST details	Copy of certificate of incorporation, PAN certificate and GST certificate
6	Staff members' Curriculum Vitae (CV)	Detailed CVs of specific team members that will be assigned to the project, outlining the relevant background and work experience. <i>(Maximum 2 pages)</i>
7	Document with three recent references listing name, contact information, company, and nature of the relationship	The Bidder shall submit documentary evidence of prior experience in the form of at least 3 (three) Completion Certificates, Work Orders, Purchase Orders, or any other relevant supporting documents, clearly indicating the document number, date, value, nature of work and the name of the issuing authority, etc.

ANNEXURE B: Financial Proposal Template

The roles and line items in this Financial Proposal Template are illustrative in nature and intended to serve as a reference framework. Agencies are encouraged to modify, add, or remove line items as appropriate to reflect their organisational structure and proposed approach, to provide a transparent and comprehensive breakdown of all projected costs.

Link for Financial Proposal Template

 [EAII_Technology Needs Assessment in Odisha_Financial Proposal Template_March2026](#)

Note: Financial Proposal must be submitted as a separate file and should not be combined with or enclosed within the Technical Proposal document.

ANNEXURE C: Format of Non-Blacklisting Certificate

Non-Blacklisting Declaration

(To be given on Organisation/Company Letterhead)

Date:

To, _____

Sub: Declaration for Non-Blacklisting

RFP Reference No: _____

Name of RFP:

Dear Sir,

We hereby declare that we are not blacklisted by any Central/ State Government/ agency of Central/ State Government of India or any other country in the world/ Public Sector Undertaking/ any Regulatory Authorities in India or any other country in the world for any kind of fraudulent activities.

Yours Faithfully,

(Signature of the Bidder, with Official Seal)

ANNEXURE D: Deliverables, Timelines, and Payment Schedule

The payment will be made in installments upon the achievement of mutually agreed-upon deliverables by the hired agency and EAll. An indicative list of deliverables and payment terms is mentioned below:

Payment Milestone	Milestone Definition	EAll Sign-off	% of Total Payment	Tentative Timeline
Contract Signing	Completed and signed a contract between the survey agency and EAll.	No specific sign-off required at this stage.	10%	T
Completion of Training for Surveyors and Supervisors	- Completion of training for the entire team of surveyors and supervisors required for timely execution of the data collection. - Satisfactory evaluation test scores and observations during the survey training and field practice, demonstrating that the survey team members are capable of successfully executing the survey.	EAll will review and approve the surveyors and supervisors – on the basis of the training evaluation test scores, field practice observations, and any other relevant aspects – and confirm the survey team's readiness and suitability for data collection.	25%	T + 30 days
Completion of Data Collection	- Completion of the stipulated number of TNA and household-level surveys. - Adherence to the timeframe and geographical coverage as specified by EAll.	EAll will verify data collection completion against the agreed sample size, geographical coverage, timeline, and quality standards, and provide sign-off upon satisfactory review.	40%	T + 60 days
Sharing of Final Cleaned Datasets with EAll	- Submission of cleaned datasets in the required format to EAll, covering the entire sample from the data collection. - Completion of all necessary data cleaning measures as laid out in the cleaning strategy document and agreed upon with EAll.	EAll will review the final cleaned datasets for completeness, accuracy, and adherence to the agreed-upon data cleaning protocols, and provide sign-off upon satisfactory review.	25%	T + 75 days

NOTE:

- 'T' refers to the date of signing of the contract. The timelines and percentage shares of total payment are indicative and subject to mutual agreement between EAll and the hired agency
- Payments will be made within 22 working days from the date of receipt of the corresponding invoice.
- The signing amount will be adjusted against the Milestone payments.