TERMS OF REFERENCE
Procurement of Consultancy Services of a Data Science Firm for Human Rights
Project: Strengthening Human Rights Data-Driven Policy Advocacy
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A.   Background Information, Rationale, and Project Description

After the 1986 People's Power Revolution and the restoration of democracy, there was hope that a culture of human rights would take root in the Philippines. The enshrinement of human rights in the 1987 Constitution, and the establishment of the Commission on Human Rights soon after, indicated that steps were being taken in this direction.

Continuing the legacy of the People Power Revolution, the Philippine Development Plan 2017-2022 (PDP) aims to fulfil the aspirations set by the Constitution through the Human Rights-Based Approach (HRBA) to public service.[1] The PDP exhorts that democratic institutions, including the Commission of Human Rights (CHR), would be strengthened, particularly in regards to monitoring and evaluation, as well as legal protection, awareness and aid.[2] At the same time, the PDP stresses that citizens would be empowered with the access to information, training, and the mechanisms with which they can participate in governance processes, so that they themselves can claim their rights.[3]

The COVID-19 pandemic, however, has placed great pressure on longstanding human rights issues, including access to education, access to decent work, women and youth rights, and civil and political rights. This is more so apparent as the country goes through the crisis and where opportunists target the social media to troll and churn out fake content, false narratives, and, smear campaigns against ordinary citizens.

In fulfillment of the PDP, the Commission on Human Rights (CHR) and the United Nations Development Programme (UNDP) in the Philippines aim to support the promotion and protection of citizen's rights through a 'Know Your Rights" advocacy campaign, especially under the time of COVID-19 pandemic.

UNDP, therefore, aims to engage the services of a Firm who can provide services that combines behavioral insights and data science in order to identify user personas, help inform the creation of constructive communication strategies, and monitor its release on different media platforms.

B.   Specific Objectives

UNDP requires the services of a Behavioral Insights and Data Science Firm to design, prototype, deploy, and monitor the application of a combination of behavioral insights and data science tools for the "Know Your Rights" advocacy campaign. The specific objectives are as follows:

B.1.   Identify the personas of targeted followings.
B.2.   Contribute to the development of a human rights narrative tailored for the persona.
B.3.   Develop a social analytical dashboard to monitor the impact of advocacy messages.

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[1] Philippine Development Plan 2017-2022 pg. 59. (http://pdp.neda.gov.ph/wp-content/uploads/2017/01/05-04-07-2017.pdfblade)
[2] Ibid pg 86.
[3] Ibid pg. 59.

B.4.   Online train CHR in the management of the dashboard.

B.5.   Turnover the developed infrastructure to the Commission on Human Rights

C.   Scope of Work

C.1.   Conduct of Rapid Ethnographic Research: Utilizing elements of Human-Centered Design and User Research, the Firm shall conduct a rapid ethnographic research to gain a deeper understanding and insights into the perspective and viewpoint of target persona through empathic interviews. Together with CHR & UNDP, the Firm shall also lead the two (2) online Persona Building workshops to develop the following outputs:

C.1.1.   Persona Empathy Map of up to 20 social media groups and followings.

C.1.2.   Persona Canvas that includes the Demographic, Psychographic & Technographic.

C.2.   Conduct of the Narrative Building & Design of Communications Plan: Using the outputs from the Core Narrative, the Firm, together with CHR and the social media/ multi-media content producers, shall determine the collective and persona narratives that will underpin the "Know Your Rights" advocacy campaign for the content producers' respective followings. The output shall include:

C.2.1. Data-driven insights for the "Know Your Rights" Core Narrative

C.2.2. Data-driven insights for the persona narratives

C.3.   **Create a** Social Listening and Monitoring Dashboard: Using readily available tools and platforms, the Firm shall develop a social listening dashboard to monitor the engagement of key social media pages and posts. In addition, the Firm will be providing support in the design of the campaign prototyping activities. The output shall include:

C.3.1.   Social Listening & Monitoring Dashboard that includes, among others: post engagement and sentiment monitoring, topic insights and analysis using AI-Machine Learning algorithms, and the like.

C.3.2.   Weekly report and analysis of trends of the impact of the social media messages under the Know Your Rights campaign for the respective social media content producers, providing data-driven recommendations on messaging improvement to ensure maximum reach and positive response.

C.3.3.   Online Training of CHR personnel through at least 2 workshops with at least 10 people per session in the use of the dashboard and facilitate turnover of the system.

C.4.   Integration to the CHR and UNDP Data Warehouse: The firm shall also ensure that there is seamless integration of the platform with the Pintig Labs Data warehouse. The data warehouse in CHR should house existing policies, reports, advisories and recommendations from CHR including the government reports and CSOs Shadow Reports, including the data on the human rights violations and other HR documents.

D. Approach and Methodology

D.1. The Firm must be able to incorporate the behavioral insight approach - designing interventions to nudge people's mindset toward a greater appreciation of human rights. The Firm should develop multiple options and test it, pursuing an iterative process enabled by rapid feedback loop to users so provide them with the data needed to quickly and continuously improve their messaging to ensure positive impact. The impact should be measured against concrete targets agreed with the users concerning the reach, nature of feedback, and sharing of posts to others.

D.2. The Firm must be able to urgently deploy its personnel, particularly the Data Scientists, immediately upon contract signing.

D.3. As listed in Section I.2. on the Firm's personnel composition, it must offer at least one (1) Senior Data Analyst, two (2) Junior Data Analysts, and (1) Ethnographer. The Firm has discretion on how much work it will allocate among its personnel but the aggregate length of employment by the Firm on the Data Management must be equivalent to 30 hours per week per month.

The data science firm is expected to deliver the expected outputs and work with existing platforms i.e. UNDP's Pintig Lab Warehouse (Azure / Data Lighthouse Initiative). But should also be knowledgeable in other data analytics platforms.

The Firm should also be knowledgeable in human rights, Universal Declaration of Human Rights and/or UN Conventions.

D.4. Due to the historic and unprecedented nature of the COVID-19 pandemic and human rights situation, candidate Firms are encouraged to include in their Technical and Financial proposals applications of CSR, philanthropic, and/or social impact initiatives that may add value to this project.

E. Deliverables and Schedule

E.1. Summary of outputs to be delivered by the Firm

E.1.1. Consultancy services for CHR.

The Firm shall perform the required consultancy services to CHR through UNDP as detailed in Section C.

E.1.2. Documentation

a. The Firm must provide documentation of varying content and format depending on the need at any time throughout the duration of this project. The form may come in any of, but not limited to, the following: formal reports, technical documentation, slide decks, informal white papers or notes, and electronic mail. These may be for any, but not limited to, the following purposes: Quality assurance, Progress reporting and Monitoring, Billing, meetings, briefings, and presentations, among others.

b. The Firm shall deliver Monthly Progress Reports, which shall contain its level of effort (LOE) allocation table supported by all its outputs as attachments.

c. The Firm shall include a Project Termination Report as part of its Monthly Progress Report for **Month 6.**

E.2.   The Firm shall perform its responsibilities & deliver the outputs and schedule below.

Deliverables/ Outputs	Estimated Duration to Complete	Review and Approvals Required
Rapid Ethnographic Research, Narrative Building & Design of Communications Plan	04 October 2020	Programme Analyst

Team Leader Institutions & Partnerships |
| Social Listening and Monitoring Dashboard | 08 October 2020 | |
| Periodic (Weekly and consolidated Monthly) report that includes analysis of sentiments, insights, and trends

Quarterly Project Report | Weekly starting October 2020

05 December 2020 | |
| Other Tasks:
1. Turnover of dashboard and on-line training thereof for CHR.
2. Pintig Labs / CHR Data Warehouse Integration
3. Project Termination Report | 30 March 2021 | |

F. Governance and Accountability

F.1.   The Firm will be under the direct supervision of the UNDP Team Leader for Institutions and Partnerships and Programme Analyst. The UNDP Project Manager shall regularly communicate and monitor the progress of their outputs.

F.2.   The Firm shall report progress, provide updates, or raise issues to the UNDP on a weekly basis. The Firm is expected to be accessible to the UNDP Programme Analyst through mobile and digital collaboration tools on an agreed schedule and when required.

F.3.   Upon the direction of the UNDP Programme Analyst, the Firm is expected to coordinate with officials, personnel, and consultants of UNDP, government agencies, CSOs, private sector partners, and other stakeholders of the project.

F.4.   In consultation with the UNDP Programme Analyst, the Firm shall provide and set up project collaboration tool/s (e.g. Teams, Slack, Trello, Wrike, Basecamp, Smartsheet, etc.) to be used for this project where UNDP project personnel may log into to check on progress and provide feedback.

G.   Expected Duration of the Contract

The project is expected to last for **six (6) months** upon contract signing.

H.   Duty Station

H.1. Due to various Community Quarantine (ECQ) measures, the Firm is expected to implement this project with a Work From Home (WFH) arrangement for its personnel based in the Philippines in compliance with the rules and guidelines set by the Philippine Government's Inter-Agency Task Force on Emerging Infectious Diseases (IATF). For out of country personnel, the Firm is expected to implement the appropriate working arrangements that complies with the rules and guidelines of the respective jurisdictions where its personnel reside, especially those on physical distancing and home quarantines. Hence, meetings and coordination, whether regular or irregular, shall be conducted through digital collaboration and conferencing tools by default.

H.2. The Firm is expected to have their own work spaces, facilities, computers, equipment, and licenses to digital tools. UNDP shall not be responsible in providing these to the Firm and its personnel.

H.3. Should rules and guidelines on physical distancing and home quarantines be recalled or modified in the respective jurisdictions where personnel involved in this project reside, the UNDP and Firm shall exercise flexibility and prioritize the physical and mental well-being of all project personnel and stakeholders.

I.   Professional Qualifications of the Successful Contractor and its Key Personnel

I.1. <u>The Firm</u>. The successful Contractor must meet all qualifications itemized below.

I.1.1.   Expertise and experience in data science (providing qualitative and quantitative analysis reports) in the field of social listening, behavioral analytics, and visualisation in the last three (3) years; and

I.1.2.   At least three (3) data science projects on human rights and/ or other development-related fields. Please use below table.

Dates and Duration of Project	Name of Project	Govt. Agency/UN Agency Name

I.2.   <u>The Firm's Project Personnel</u>. The successful contractor must offer four (4) key personnel to this project who meet the minimum qualifications presented below. Please use the UNDP CV Form for all key and additional personnel as part of the Firm's technical proposal.

Position or role	Minimum qualifications
Senior Data Analyst *(1 personnel)*	• At least two (2) years relevant work experience as a data scientist, if with a Master's or Doctorate degree or three (3) years total data science work experience ▪ At least two (2) completed software, application, and/or web development projects on human rights or related fields. ▪ Submit at least two (2) ongoing and/or completed data science project;
Junior Data Analyst *(2 personnel)*	▪ At least two (2) years relevant experience (if with a Master's or Doctorate) as a data scientist, data analyst, and/or data engineer and/or data visualization developer; Or three (3) years of relevant work experience if with a Bachelor's Degree; ▪ At least a Bachelor's degree in statistics, economics, computer science, engineering, business administration, management information systems, statistics, data science, , engineering business intelligence, mathematics or other related courses; ▪ Submit at least two (2) on-going and/or completed data science project.
Ethnographer *(1 personnel)*	▪ At least three (3) years professional experience as an ethnographer or researcher; ▪ Submit at least one (1) on-going and/or completed ethnographic research project.

The Firm may, but is not required to, provide documentation for additional personnel. For the purpose of evaluating proposals, UNDP shall assess the qualifications of project personnel only for the four (4) roles enumerated above.

J.   Price and Schedule of Payments

J.1.   UNDP shall deliver payment to the Firm in tranches contingent on both delivery and acceptance and certification of the outputs as presented in the Schedule of Payments table below.

J.2.   Payments shall only be made upon review, acceptance, and rectification of errors and/or improvement of the work or service as necessary.

Schedule of Payments and Price		
Deliverable or output	Target due date	% of contract price
1. Submission of Rapid Ethnographic Research, Narrative Building & Design of Communications Plan	04 October 2020	1st (20%)
2. Submission of Social Listening and Monitoring Dashboard	10 November 2020	2nd (30%)

3.	Submission of Periodic (Weekly and consolidated Monthly) report that includes analysis of sentiments, insights, and trends Quarterly Project Report	30 January 2020	3rd (30%)
4.	Pintig Labs / CHR Data Warehouse Integration report. Turnover of platform to CHR and UNDP effectively and functionally working On-line training evaluation of CHR in the use thereof approved by CHR. Submission of Project Termination Report	30 March 2021	4th (20%)
TOTAL (100%)			

K.   Criteria for Evaluation

K.1.   Candidate Firms shall first be assessed based on their eligibility which will consider the firm's legal status, qualifications, portfolio, financial standing, performance, etc. Please refer to the solicitation document for the full requirements.

K.2.   Candidate Firms shall be evaluated in accordance with UNDP's Combined Scoring Method, whereby the Technical Proposal accounts for 70% and the Financial Proposal accounts for 30%.

K.3.   The Financial Proposal will be computed as a ratio of the Proposal's offer to the lowest price among the proposals received by UNDP.

K.4.   The evaluation of the Technical Proposal will be based on the following three (3) major criteria, as shown in the table below, for a total of 1,000 points. The minimum passing score for the Technical Proposal is 700 points.

Summary of Technical Proposal Evaluation Criteria	
Criteria	**Points obtainable**
1. Firm's qualification, capacity, and experience	100
2. Proposed implementation plan, methodology, and approach	450
3. Expertise and experience of the Firm's project management personnel	450
Total	**1,000**

Criteria # 1: Firm's qualification, capacity, and experience	Points obtainable
General Organizational Capability and relevance of specialized competence and experience on data monitoring and management system response to human rights and governance concerns during times of crisis.	50

Demonstrable evidence of experience in implementing similar human rights-related projects with Philippine government or an international development or multilateral organization;	50
Total for Criteria # 1	**100**

Criteria # 2: Proposed implementation plan, methodology, and approach		Points obtainable
2.1.	Understanding of human rights: Demonstrable appreciation of human rights concerns and issues, including the role of CHR. Processing, storage and archiving of HRs information and data content and management;	250
2.2.	Description of the approach, methodology, and implementation proposals based on the scope of work presented. to mainstream the human rights-based approach or exceeding the requirements of the requirement. (75 points) Demonstration of ability to plan, contextualize, integrate and effectively implement the project within the given timelines and overall boundaries of the project. (75 points) Candidate Firms must submit a detailed understanding of this requirement, proposed solutions, ideas, timelines and level of effort per key personnel.	150
2.3.	Offer of unique, creative, and/or innovative ideas in implementing the requirements of the project	50
	Total for Criteria # 2	**450**

Criteria # 3: Expertise and experience of the Firm's project management personnel			Points obtainable
3.1.	Composition and structure of the team proposed should be majority of organic staff. Are the proposed roles of the management and the team of key personnel suitable for the provision of the necessary services? Are all the accountabilities clearly spelled out in the Firm's proposal? Level of effort?		Yes/No
3.2.	*Qualifications of the Firm's project management personnel*		
3.2. a.	**Senior Data Analyst (1)**		**250**
	At least two (2) years relevant work experience as a data scientist, if with a Master's or Doctorate degree or three (3) years total data science work experience *At least 2 years with Masteral/Doctorate = 80 points; Additional years = up to a maximum of 100 points*	100	

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	Or *At least 3 years data science work = 70 points; Additional years = up to a maximum of 100 points*		
	At least two (2) completed software, application, and/or web development projects on human rights or related fields.	100	
	Submit at least two (2) ongoing and/or completed data science project;	50	
3.2. b	**Junior Data Analysts (2)**		**150**
	▪ At least two (2) years relevant experience (if with a Master's or Doctorate) as a data scientist, data analyst, and/or data engineer and/or data visualization developer; Or three (3) years of relevant work experience if with a Bachelor's Degree; *At least 2 years relevant experience with Masteral or Doctorate = 80 points; Additional years = up to a maximum of 100 points;* *OR* *At least 3 years relevant experience = 60 points; Additional years = up to a maximum of 100 points*	100	
	At least a Bachelor's Degree in statistics, economics, computer science, engineering, business administration, social sciences, or other relevant degree, with preference to those with certifications or training; *At least a Bachelor's degree = 20 points; with Masteral = full points*	30	
	Submit at least two (2) on-going and/or completed data science project *At least 2 works = 15; Additional works = up to a max of 20 points*	20	
3.2.c	**Ethnographer (1)**		**50**
	▪ At least three (3) years professional experience as an Ethnographer or Researcher; *At least 3 years = 20 points; Additional years = up to a maximum of 30 points*	30	
	- One (1) on-going and/or completed ethnographic research project.	20	
Total for Criteria # 3			**450**

L. **Additional References and Resources**
    L.1.   List of abbreviations
    L.2.   Provisional list of datasets

This TOR is approved by:

Signature: _____
Name and Designation: **Maria Luisa L. Jolongbayan**
                               Team Leader, Institutions and Partnerships
Date of Signing: 10–Sep–2020
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L.1.   List of abbreviations

COVID-19	Coronavirus disease 2019
CSO	Civil Society Organization/s
DICT	Department of Information and Communications Technology
DILG	Department of the Interior and Local Government
DOH	Department of Health
DTI	Department of Trade and Industry
ECQ	Enhanced Community Quarantine
IATF	Inter-Agency Task Force on Emerging Infectious Diseases
LOE	Level of Effort
TOR	Terms of Reference
UNDP	United Nations Development Programme
WFH	Work From Home