



Ministry of Health, Wellness and Elderly Affairs

Health System Strengthening Project

Terms of Reference

Independent Consultant for Client Satisfaction Survey

Prepared: September 2023

1: Position Information

Title of Consultancy Service:	Consultancy to conduct client satisfaction survey to support citizen engagement throughout the PBF Pilot
Reports to:	The Project Coordinator through the Monitoring and Evaluation (M&E) Officer
Duration of Assignment:	Twelve (12) months from contract signing or by October 31, 2024, whichever comes first
Consultant Type Required:	Individual or Firm

2: Introduction

In 2018, the Government of Saint Lucia (GOSL) secured financing of US\$20 million through the World Bank (WB) to launch the Health System Strengthening Project (HSSP) to support the government's initiative to improve the accessibility, efficiency and responsiveness of key health services. The project focuses on providing a robust policy framework for Universal Health Coverage, and driving a primary healthcare-based sector reform. As part of this agenda, the project includes the implementation of a pioneering Performance-Based Financing (PBF) scheme, with a specific focus on select chronic Non-Communicable Diseases (NCD) services.

The Performance Based Financing (PBF) Pilot will focus on strengthening diabetes (DM) and hypertension (HTN) management at the primary care level; primary care facilities comprise 31 Wellness Centres, 2 district hospitals and 1 polyclinic (34 facilities in total). The package of services to be provided under the PBF scheme is related to the screening and treatment of these diseases.

The scheme will be implemented in two phases. In the first phase, the PBF scheme will be implemented in 8 facilities for the first 6 months (pre-pilot phase). In the second phase, PBF will be scaled-up to the remaining 9 facilities (all at once) from the 7th month onwards (pilot phase). The pilot will be accompanied by an operational evaluation to inform the operational design and scale-up decisions. Upon successful implementation of the pilot, PBF is expected to be expanded nationwide. A proposed model for counter verification will be tested under the PBF pilot, which may be calibrated prior to scaling up.

The Performance Based Financing Unit (PBFU) within the Project Implementation Unit (PIU) of the Ministry of Health, Wellness and Elderly Affairs (MOHWEA) will provide technical and administrative oversight for the pilot under the guidance of the PBF Executive Team. For the duration of the pilot, the PIU will: (i) support administrative, fiduciary, and monitoring and evaluation aspects; and (ii) ensure adequate capacity building for the PBFU during the pilot and plan the transition to support the institutional sustainability of the scheme past project closing.

Under the PBF Pilot, the MOHWEA pays participating facilities (PFs) incentives based on their performance, as well as subsidies to support laboratory tests for their HTN and DM patients. The incentive payments are based on the quantity and quality of select services (hypertension and diabetes screening and treatment) provided.

A critical link with citizen engagement is understanding whether patients are satisfied with the care that they receive from participating facilities. Under the PBF pilot, quarterly satisfaction surveys are meant to be conducted with patients to explore the essence of five main questions:

1. What made patients start/stop using the product/service?

2. What do they like/dislike about the product/service?
3. What suggestions do they have for improving the product/service?
4. Would the patient consider using the product/service in the future?
5. Would the patient recommend the product/service to others?

The PIU's M&E Officer will supervise the implementation of the above-mentioned surveys; the PBFU will oversee the process. The PBF Unit will liaise with the World Bank Team to develop/adapt the requisite tools and materials to implement these surveys.

The PBFU/PIU wishes to contract the services of an individual consultant to conduct satisfaction surveys of clients of PFs as part of the citizen engagement process.

3: Overall Objective

The primary objective of the consultancy is to conduct client surveys as part of the citizen engagement process to determine:

1. The degree of satisfaction of clients with the services that they received.

4: General Scope of Services

The consultant is accountable for ensuring the delivery of high-quality data and analysis within the specified timeframe as outlined in this TOR. The assignment encompasses four primary components as detailed below:

- A. Design survey and methodology: This encompasses all pre-survey activities, such as finalizing the survey questionnaire, refining the survey methodology, obtaining ethical approval for survey implementation, and devising an implementation plan.
- B. Executing the survey: This involves conducting client surveys at all PBF participating facilities on a quarterly basis.
- C. Cleaning and archiving data: This involves data entry, data cleansing, and transforming the collected data into a machine-readable format, ultimately creating a .csv file for analysis and archiving purposes.
- D. Data analysis and reporting: This entails the comprehensive analysis of the collected data and the production of a summary report that highlights the survey activities and presents the findings.
- E. Participation in PBF implementation workshops and results dissemination events.

4.1: Specific scope of Services

- A. Design survey and methodology
 - a. Finalizing the Survey Questionnaire:
 - i. Review and refinement of the survey questions to ensure clarity and relevance.
 - ii. Conducting a field test of the questionnaire
 - iii. Incorporation of stakeholder feedback for questionnaire improvement.
 - b. Finalization of the Survey Methodology:
 - i. Refinement of the survey methodology to enhance data collection efficiency, including the estimation of the sample size and the ideal format (e.g., phone-based or convenience sample of patients exiting a health center), in coordination with the PBFU Team

- ii. Consideration of best practices in survey design and implementation.
 - c. Obtaining Ethical Approval:
 - i. Collaboration with relevant authorities to secure ethical clearance for survey activities.
 - ii. Ensuring compliance with ethical standards and protocols.
 - d. Devising an Implementation Plan: Development of a comprehensive plan outlining survey logistics, timelines, and resource requirements, including:
 - i. Creation of a detailed calendar outlining the consultant's anticipated duration at each facility.
 - ii. Allocation of specific timeframes for data collection, interviews, and data entry at each location.
 - iii. Identification of potential challenges that may arise during survey implementation.
 - iv. Formulation of proactive strategies to address and mitigate these challenges effectively.
 - v. Establishment of protocols for data validation and cleansing to uphold data accuracy and integrity.
 - vi. Utilization of tools and systems to monitor and track the progress of survey implementation.
 - vii. Regular checks and oversight to validate the quality of data collection and entry.
- B. Executing the survey
 - a. Undertaking the client interviews among the selected sample
- C. Cleaning and archiving data
 - a. Data Entry:
 - i. Accurate and systematic entry of collected data into a secure database.
 - ii. Verification and validation of data to minimize errors.
 - b. Data Cleaning:
 - i. Identifying and rectifying inconsistencies or inaccuracies in the dataset.
 - ii. Ensuring data integrity and reliability.
 - c. Data Transformation
 - i. Converting any data collected on paper-based surveys into a machine-readable format.
 - ii. Organizing and structuring data for analytical purposes.
 - d. Archiving Data:
 - i. Creation of a .csv files for the raw and cleaned data for long-term storage and reference.
 - ii. Creation of a codebook for the cleaned data, including complete labelling of variable names.
 - iii. Implementation of data archiving best practices for future retrieval and analysis.
- D. Data analysis and reporting
 - a. Comprehensive Data Analysis:
 - i. Utilizing statistical software (STATA, SPSS, etc.) to analyze collected data.
 - ii. Applying appropriate statistical techniques to derive meaningful insights.
 - b. Produce and submit Final Client Satisfaction Survey Report to the PBFU/PIU
 - i. Generation of a detailed summary report.

- ii. Presentation of survey activities, methodologies, and key findings (PowerPoint slides).
- iii. Inclusion of visual aids, tables, and charts for clarity.

5: Deliverables

The survey is expected to be repeated every quarter. Therefore, deliverables 3-6 would need to be repeated for each round (quarter).

No.	Output	Round	Date
1	Finalized survey questionnaire and survey methodology submitted for ethical approval	Once	2 weeks from contract signing (CS)
2	Implementation Plan, which should schedule fieldwork/data collection, data analysis and reporting of findings	Once	3 weeks after contract signing
3	Cleaned and transformed data in .csv format	1	February 9, 2024
		2	May 10, 2024
		3	August 9, 2024
4	Preliminary data analysis findings report	1	February 16, 2024
		2	May 17, 2024
		3	August 16, 2024
5	Final Client Satisfaction Survey Report	1	March 1, 2024
		2	May 31, 2024
		3	August 30, 2024
6	Slide deck with key findings, based on the Report and consultations	1	March 8, 2024
		2	June 7, 2024
		3	September 6, 2024

6: Required Qualifications and Experience

6.1: Qualification and Skills

- A postgraduate degree with a specialization in research, encompassing fields such as statistics, epidemiology, demography, public health, social sciences, and/or developmental studies.
- Proficiency in analytical and qualitative skills
- Proficient command of survey software (such as Google Forms).
- Proficient command of statistical software (such as R, STATA, or Python).
- Proficient command of Microsoft Excel, Word, and PowerPoint.
- Demonstrated high levels of personal and professional integrity, self-motivation, and the ability to thrive in a multicultural environment and collaborate effectively in teams.
- Exceptional proficiency in both written and spoken English, coupled with strong communication and writing abilities.
- A results-oriented disposition with a track record of effective problem-solving.

6.2: Experience

- Minimum of three (3) years previous experience in conducting field research and interviews
- At least three (3) years proven experience in working with data and conducting surveys

7: Working Arrangements

Technical oversight for the Consultant will be provided by the PBF Coordinator with support from the Database Manager and M&E Officer. The M&E Officer will supervise the work of the consultant, ensuring acceptable quality of deliverables and adherence to agreed timelines.

7.1: Client's Responsibilities

- Overseeing the overall management, supervision, and coordination of the consultancy.
- Handling logistics related to the selection of a sample of clients from SLUHIS.
- Making payments based on approved deliverables.

2: Consultant's Responsibilities

- Maintaining regular communication with the PIU to ensure the timely completion and quality of the aforementioned deliverables.