

Invitation for Submission of Research Proposals for Equal Opportunities Awareness Survey 2021

BACKGROUND OF THE STUDY

1. The Equal Opportunities Commission (EOC) works towards the elimination of discrimination on the grounds of sex, marital status, pregnancy, disability, family status, and race. The Commission promotes equality of opportunities between men and women, between persons with and without a disability, and irrespective of family status and race. It is the EOC's vision to create a pluralistic and inclusive society free of discrimination where there is no barrier to equal opportunities.

2. With the spirit of continuous improvement, the EOC conducted five telephone surveys on public perception about equal opportunities (EO) awareness and EOC's work in the period of 1998-2015.¹ To obtain a more up-to-date picture about public's concerns over issues of equal opportunities and anti-discrimination, the EOC has decided to commission the EO Awareness Survey 2021 ("Survey 2021") through telephone interviews.

3. The EOC encourages proposals submitted by research teams with expertise in topics of equal opportunities and anti-discrimination.

SPECIFICATIONS OF SERVICE

4. All the specifications listed below are essential requirements.

Survey Objectives

5. The proposed survey is expected to be a fact-finding exercise with

¹ Research reports of EO Awareness Survey conducted in 2012 and 2015 could be found in EOC's website.

specific objectives as follows:

- (a) To gauge public perception towards the concept of equal opportunities;
- (b) To gauge public awareness and their perception of the EOC's work against discrimination within its ambit;
- (c) To gauge perception from general public on the effectiveness of the EOC programmes including promotion, public education, training and consultancy, radio programme, etc.;
- (d) To examine public attitudes towards persons with disability;
- (e) To understand public views on disability equality and discrimination in the fields of employment, education, and access to services and facilities;
- (f) To solicit public opinion on forthcoming EO issues such as legislation against discrimination on the grounds of age, religion, sexual orientation and gender identity, new immigration status, etc.; and
- (g) To provide recommendations on the advancement of the EOC's work against discrimination within its ambit as well as strategic planning advice on forthcoming EO issues and other areas of anti-discrimination work the public expect the EOC to move onto.

6. It should be added that, first, the Contractor is expected to conduct trend analyses in order to compare the findings of the proposed survey with those from the EO Awareness Survey 2015 and from the Baseline Survey on Public Attitudes towards Persons with a Disability 2010 commissioned by the EOC, where appropriate and applicable.² Second, related items asked in other

² Reports of these two surveys can be found in EOC's website.

countries/ regions should be included for cross-national comparison.³ The latter suggestions should be illustrated in the Technical Proposal and will be counted towards the bidder's score in the assessment and selection exercise.

Survey Coverage

7. The Survey 2021 is a telephone survey which must cover all Hong Kong residents of age 15 or above living in Hong Kong, including those who speak Cantonese, Putonghua or English, but excluding tourists.

Sample Design and Sample Selection

8. A minimum of 1,500 successfully interviewed persons, who are the target of the Survey 2021, should be drawn from (1) land-based households that are installed with residential telephone line in Hong Kong and (2) mobile telephone numbers. In the former case, random digit dialing or equal probability sampling of telephone numbers from a comprehensive list of landline residential telephone numbers shall be deployed for sample selection. In each successfully contacted residential unit, only one person aged 15 or above will be selected for interview by the "Last Birthday" method. In the case of mobile phone numbers, the owner of the mobile phone number who is aged 15 or above will automatically become the target of the Survey 2021.

9. A successful interview is defined as a telephone interview with the target respondent resulting in the respective questionnaire being completed in full.

10. The overall response rate shall be targeted at 40% or more. The response rate is calculated by dividing the number of successful telephone interviews by the total number of eligible telephone numbers selected.⁴ To

³ For instance, items concerning discrimination were asked in Eurobarometer Surveys.

⁴ Eligible cases include: (1) successfully completed interviews and (2) unsuccessful cases. The latter cases are: (a) refusal cases, (b) mid-way termination cases, (c) non-contact cases (including no answer, busy line, selected person not-at-home, answering machine, call blocking

avoid confusion, please list the formula to be adopted in calculating the response rate in the Technical Proposal.

Questionnaire Design

11. The questionnaire shall be designed by the Contractor in consultation with the representative(s) of the EOC and subject to the approval of the EOC. The questions should be set in both Chinese and English.

12. In designing the questionnaire, the Contractor is required to review all reports of research studies commissioned and carried out by the EOC previously on similar topic. The Contractor is also required to advise the EOC of any other relevant research studies or surveys which might help satisfy the requirements of the Survey 2021.

Recruitment and Training of Interviewers and Supervisors

13. The Contractor is responsible for recruiting and training interviewers and supervisors for the Survey 2021. A sufficient number of interviewers and supervisors shall be designated for the Survey 2021 so as to ensure that the fieldwork can be completed within a reasonable period of time with good quality.

Pilot Survey

14. A pilot survey shall be conducted with at least 30 respondents successfully. Each part of the questionnaire must be fully tested in the pilot survey. The Contractor shall document the findings of the pilot survey and make recommendations and necessary amendments as required to improve the survey operation and questionnaire design. The successful interviews in the pilot survey will not be counted in the main fieldwork.

password needed, and not attempted), and (d) language problem.

Fieldwork

15. With the use of computer-assisted telephone interviewing system, interviews are to be conducted to collect the required data within a reasonable period of time. Logistics and planning for the telephone survey shall be the responsibility of the Contractor.

16. The Contractor shall ensure that the target response rate and the target numbers of respondents successfully interviewed are achieved and that survey results are not biased by non-contact and non-response cases. The treatment of unsuccessful telephone interviews must be strictly defined and monitored. The telephone calls should be tried at different times of a day and on different days before a case is classified as non-contact. Those unsuccessfully contacted telephone numbers should be tried at least six times on different days before a non-contact status is assigned.

Data Processing and Tabulation

17. All the completed questionnaires shall be properly edited, coded, and validated by the Contractor. A verbatim report of the answers to all open-ended questions, coding manual, editing, validation rules, and imputation rules shall be prepared in consultation with the EOC. Upon completion of the data entry and validation, a copy of the “cleaned” data file in SPSS format or other format mutually agreed must be given to the EOC with the coding manual and the foregoing verbatim report.

18. A tabulation plan detailing the statistical tables to be produced from the Survey 2021 results shall be prepared and subject to the approval of the EOC. All the statistical tables in the tabulation plan shall be provided to the EOC before the preparation of the survey report.

Data Analysis

19. The Contractor shall be responsible for the analysis of findings from the survey in consultation with the representative(s) of the EOC.

Presentation of the Results of the Survey 2021

20. The Contractor should present the results of the study according to the following:

- (a) A bilingual (English and Chinese) full report of the Survey 2021, including if necessary a glossary of definition of terms and technical jargons, should be produced. The format of the report should be agreed by the EOC. As well as an executive summary, the full report should include the following as its contents: research objectives, methodology, findings, discussions, recommendations, and implications.
- (b) Info graphics in bilingual format should be produced to present the research findings.
- (c) A validated and clean data file in a mutually agreed electronic format should be submitted to the EOC.
- (d) Oral presentations of the research results to the EOC and to the public at a media briefing should be made.
- (e) Research progress is subject to monitoring by the EOC. It is imperative to submit progress reports and present results orally as means of evaluation.

OTHERS

Duration of the Survey 2021

21. It is expected that the Survey 2021 will be commenced before the end of November 2020 and completed within a timeframe of 9 months.

Budget of the Survey 2021

22. Breakdown of costs for the Survey 2021 is required. The amount of fee paid to the Contractor will be published in the EOC's website after the completion of the research study.

Copyright

23. Copyright of the research report, data collected and information derived from the study shall remain the property of the EOC. Subject to the prior approval of the EOC, the Contractor might be allowed to use the data and information for the purposes of academic research and academic publication.

Selection Criteria

24. The EOC will consider both the cost and quality of the research proposals concurrently in reviewing the proposals. Selection criteria can be found in the EOC's website.

Research Proposal

25. Research teams who are interested in taking up the Survey 2021 are required to submit a Technical Proposal and a Fee Proposal.

26. The Technical Proposal should include, but not limited to, the following:

- (a) An overview of the research team's perception and understanding of the subject matter of the study;
- (b) A detailed illustration of the proposed items specified in Survey Objectives (d) and (e) and required in paragraph 5 of this invitation to be included in the questionnaire;
- (c) An in-depth discussion of the sample design and sample selection to be adopted;
- (d) A description of the pilot survey conducted to verify testing instruments and procedures, the research ethics practices, and the quality control measures used in both fieldwork and office editing;
- (e) A presentation of data processing and data analysis plans;
- (f) A proposed work schedule of the entire survey according to the duration specified above;
- (g) A description of the research teams, including the qualifications and experiences of the principal investigator and other key research personnel; and
- (h) Any other information that might assist in the evaluation of the proposal.

27. The Fee Proposal should include a budget plan with breakdown of costs for the research study.

Other Conditions

28. In addition, the Contractor (including members of the research team and all interviewers and supervisors) is required to have basic knowledge of equal opportunity issues and to conduct the study in a sensitive manner when dealing with equal opportunity issues.

29. Only bidders who are shortlisted and invited for selection interviews will be notified of the result not later than 10 weeks from the deadline for submitting research proposals.

30. The EOC is not obliged to select any of the research proposals submitted or appoint any of the bidders submitting research proposals.

SUBMISSION OF PROPOSAL

31. Submission in Two Envelopes

- (a) The **Technical Proposal** and the **Fee Proposal** should be submitted in two separate, sealed envelopes.
- (b) **Technical Proposal Envelope:** One original and three duplicate copies of the Technical Proposal in bilingual (English and Chinese) format should be prepared and submitted in a separate, sealed envelope.
- (c) **Fee Proposal Envelope:** (i) One original and three duplicate copies of the Fee Proposal in bilingual (English and Chinese) format and (ii) one original copy of completed and signed form of “Warranty for Anti-Collusion” (Annex 1) in bilingual (English and Chinese) format should be prepared and submitted in a separate, sealed envelope.
- (d) The two sealed envelopes containing the Technical Proposal and the Fee Proposal (with the completed and form of “Warranty”) should be put in one sealed envelope and should be submitted by hand or courier to the EOC Office (address as shown below) **on or before 5:00p.m., 24 September 2020 (Thursday)**. The envelope must be marked with “Equal Opportunities Awareness Survey 2021”

but should not bear any indication which may relate the submission to the research team.

**Equal Opportunities Commission
16/F., 41 Heung Yip Road,
Wong Chuk Hang,
Hong Kong**

32. Bidder that has submitted a proposal will be contacted for the electronic version of the Technical Proposal and the Fee Proposal.

33. Bidder that has submitted a proposal may be required to give an oral presentation to Members of the EOC.

ENQUIRIES

34. For enquiries concerning this invitation for research proposals, please call 2106 2255.

*Equal Opportunities Commission
July 2020*

To: Equal Opportunities Commission

Dear Sir/ Madam,

Warranty for Anti-Collusion

- (1) By submitting a tender, the Research Team represents and warrants that in relation to the invitation to tender of “Equal Opportunities Awareness Survey 2021”:
 - (a) it has not communicated and will not communicate to any person other than the Equal Opportunities Commission the amount of any tender price;
 - (b) it has not fixed and will not fix the amount of any tender price by arrangement with any person;
 - (c) it has not made and will not make any arrangement with any person as to whether it or that other person will or will not submit a tender; and
 - (d) it has not otherwise colluded and will not otherwise collude with any person in any manner whatsoever in the tendering process.

- (2) In the event that the Research Team is in breach of any of representations and/ or warranties in Clause (1) above, the Equal Opportunities Commission shall be entitled to, without compensation to any person or liability on the part of the Equal Opportunities Commission:
 - (a) reject the tender;
 - (b) if the Equal Opportunities Commission has accepted the tender, withdraw its acceptance of the tender; and
 - (c) if the Equal Opportunities Commission has entered into contract with the Research Team, terminate the contract.

- (3) The Research Team shall indemnify and keep indemnified the Equal Opportunities Commission against all losses, damage, costs or expenses arising out of or in relation to any breach of any of the representations and/ or warranties in Clause (1) above.

- (4) A breach by a Research Team of any of the representations and/ or warranties in Clause (1) may prejudice its future standing as the Equal Opportunities Commission’s supplier or service provider.

- (5) Clause (1) shall have no application to the Research Team’s communications in

Annex 1

strict confidence with its own insurers or brokers to obtain insurance quotation for computation of the tender price, or with its professional advisers, and consultants or sub-contractors to solicit their assistance in preparation of tender submission.

- (6) The rights of the Equal Opportunities Commission under Clauses (2) to (4) above are in addition to and without prejudice to any other rights or remedies available to it against the Research Team.

Signature of the
Authorized Person
Representing the _____
Research Team:

Name of the Authorized
Person (in Block _____
Letters):

Organization Chop: _____

Date: _____