

SURVEY SERVICES POLICY

Statistical Institute of Belize

Key Details:

- Policy Number: SS 04 - 01
- Policy prepared by: Leopold L. Perriott
- Approved by the Board on: 11 October 2019
- Policy became operational on: 11 November 2019
- Next review date: January 2022
- Last reviewed on: 29 July 2020
- Updates approved by the Board on: 10 December 2020

Introduction:

The Statistical Institute of Belize (SIB) provides survey services to external clients upon request. Prior to the commencement of survey work, an MOU must be established between the SIB and the client to formalize the terms and conditions of the services being provided and the respective responsibilities of each party.

Purpose:

The purpose of this policy is to provide guidelines for establishing formal agreements for the provision of survey services to external clients. Since the SIB is not able to support the survey activities of other agencies from its own budget, external clients are required to reimburse the SIB for any funds spent in carrying out the requested survey services.

Procedures:

- Formal requests for the provision of survey services must be made at least six (6) months for a module to an existing (or scheduled) survey or at least eighteen (18) months for a complete survey prior to the commencement of field activities. Such requests are to be forwarded to the Surveys Committee for review and approval.
- A formal request should include:
 - Outline of the purpose of the study (including sample size and target population)
 - A timeline for expected deliverables
 - Source of funding
- If the Survey Committee determines that the request is feasible, the client will be asked to provide any supporting documentation, such as draft questionnaires, training manuals, tabulation plan etc.
- If the proposal is approved by the Surveys Committee, an MOU will be prepared and signed within six (6) months to establish the SIB's level of involvement in the survey, payment schedules, and deliverables (see Survey Services Agreement template in Annex 1).
- If a data set is included as one of the deliverables, it must be anonymized in accordance with SIB's established anonymization procedures.
- Upon satisfactory completion of all deliverables, the client will provide the SIB with a Certificate of Completion (see template in Annex 2).
- For less labour-intensive survey related services (e.g. sample selection, questionnaire development, etc.), an MOU is not required. However, a formal request must be submitted to the Surveys Committee for review and approval. If approved, the client will be informed in writing of the assistance to be provided and any associated costs. The client must acknowledge and agree in writing to the SIB's proposal.

Annex 1: Survey Services Agreement Template

SURVEY SERVICES AGREEMENT

THIS SURVEY SERVICES AGREEMENT is made on this ____ day of (Month), 20XX, between the Client, (Client Name), hereinafter referred to as (“the Client”) located at (Client Address) and the **Statistical Institute of Belize** hereinafter referred to as (“the SIB”), a statutory body established under the Statistical Institute of Belize Act, 2006, located at 1902 Constitution Drive, City of Belmopan, Belize.

The (Client) and the SIB shall hereinafter be referred to collectively as “Parties” and singularly as “Party”.

WHEREAS:

- A. the (Client) has requested the services of the SIB to conduct a (national, district, or community level) survey to (purpose of survey) and to provide the requisite services to carry out said survey as defined in this Agreement;
- B. the SIB has agreed to execute said survey on the terms and conditions set forth in this Agreement;

NOW THEREFORE THE PARTIES hereby agree as follows:

1. **SCOPE OF AGREEMENT**

The SIB shall submit to the (Client) the services and deliverables as specified below and detailed in the attached ‘Schedule of Activities’.

- Sample Design
- Questionnaire Review
- Testing of Questionnaire
- Training of field staff
- Data collection
- Data Processing
- Two progress reports on the project: First delivery at the end of (Date of first deliverable) and second delivery at the completion of the data collection.
- (Any other deliverables agreed upon)

2. **EFFECTIVE DATE AND TERMINATION**

- a. This Agreement shall come into force on the date hereof, and shall continue to be effective until **(End date of agreement)** or any other period as may be subsequently agreed upon by the Parties in writing.
- b. Either Party may elect to terminate this Agreement at any time by giving one (1) month prior written notice.
- c. In the event of termination, the SIB will be paid for services rendered up to the agreed upon final date of activities plus 50% of the Administrative Fee/a prorated portion of the Administrative Fee. Similarly, the **(Client)** will be reimbursed any remaining funds paid in advance to the SIB after all expenditures relating to this survey have been accounted for by the SIB.

3. **PAYMENT**

- a. For services rendered pursuant to the 'Schedule of Activities', the **(Client)** shall pay the SIB the agreed amount of **(Value in words) Belize Dollars (BZ\$Value)**.
- b. A sum of **(Value in words) (BZ\$Value)** or 25% of the contract amount shall be paid upon the signing of this Agreement.
- c. A sum of **(Value in words) (BZ\$Value)** or 50% of the contract amount shall be paid two months prior to the commencement of the collection of data.
- d. A final payment of **(Value in words) (BZ\$Value)** or 25% of the contract amount shall be paid upon the delivery and acceptance of all deliverables.
- e. If any payment reflected in (b) or (c) above is delayed by the Client, the conduct of the survey will be delayed until such time that the client is prepared to resume activities and the SIB has a suitable opening in its schedule.

4. **PERFORMANCE STANDARDS**

- a. The SIB undertakes to perform the services hereunder with the highest standards of professional and ethical competence and integrity.
- b. In the event any work performed or any document prepared by the SIB is considered unsatisfactory by the **(Client)**, the latter will notify the SIB in writing specifying the problem.
- c. The SIB will have a period of fifteen (15) working days from the date of receipt of the notification to remedy the problem.

5. **CONFIDENTIALITY**

The Institute is required by the Statistical Institute of Belize Act, 2006 to maintain strict confidentiality of all data or information that it collects, produces or possesses. Any data collected in this survey may be used by the SIB for the production of official statistics. Persons from the **(Client)** or consultants working on behalf of the (Client) who will work along with the Institute to execute this survey will be required to sign an Oath of Secrecy as mandated in the Law.

6. **ASSIGNMENT**

The SIB shall not assign this Agreement or sub-contract any portion of it without the **(Client)**'s written consent.

7. **APPLICABLE LAW & LANGUAGE**

This Agreement shall be governed and interpreted in accordance with the laws of Belize and the language of the Agreement shall be in English.

8. **ARBITRATION**

The Parties shall attempt in good faith negotiations to resolve and dispose of any dispute, difference or claim arising out of this Agreement. Any dispute which cannot be resolved by negotiations between the Parties within ninety (90) days from commencement of good faith negotiations may be referred by either Party for settlement by arbitration in accordance with the Laws of Belize

9. **AMENDMENTS**

This Agreement, including any attachment hereof, may be amended, varied, deleted or added to only by an instrument in writing duly signed by the signatories to this Agreement or an authorized representative of each of the Parties hereto.

10. **ENTIRE AGREEMENT**

This Agreement along with its attachment shall constitute the entire agreement between the Parties with respect to the subject matter herein, and shall supersede any prior oral or written agreement between the Parties.

The mutual rights and obligations of the **(Client)** and the SIB shall be set forth in the Agreement, in particular:

- the SIB shall carry out the services in accordance with the provisions of the Agreement;
and

- the **(Client)** shall make payments to the SIB in accordance with the provisions of this Agreement, and carry out other obligations in accordance with the 'Schedule of Activities'.

IN WITNESS WHEREOF, the Parties hereto have hereby executed this Agreement by their duly authorized signature on the aforementioned date.

For the (Client)

For the Statistical Institute of Belize

(Name)

(Name)

(Position)

Director General

11. SCHEDULE OF ACTIVITIES

CERTIFICATE OF COMPLETION

Project and Client Information:

Client Name:

Client Address:

Project Title:

Start Date:

End Date:

Cost of Project:

Project Summary:

Purpose of Study:

Sample Size:

Target Population:

Deliverables:

Timeliness of Project:

Testimonial of Overall Client Satisfaction:

For the (Client)

(Name)

(Position)

For the Statistical Institute of Belize

(Name)

Director General