

REQUEST FOR EXPRESSIONS OF INTEREST (CONSULTING SERVICES – FIRMS SELECTION)

2024-PMS3(015)-BI—CQS-063

PHILIPPINES

TEACHER EFFECTIVENESS AND COMPETENCIES ENHANCEMENT PROJECT (TEACEP)

Loan No./Credit No./ Grant No.: 9481-PH

Assignment Title: Consultancy Services to Conduct Independent
Verification

Reference No. TEACEP-CS-1-CQS

The Department of Education (DepEd) *has received* financing from the World Bank toward the cost of the Teacher Effectiveness and Competencies Enhancement Project (TEACEP) and intends to apply part of the proceeds for consulting services.

The consulting services (“the Services”) include four-year contract for the Consultancy Services to Conduct Independent Verification of TEACEP with the total contract amount of USD 299, 222. The consultancy service will assist the DepEd in verifying, validating, and confirming the accomplishment of the project implementation under the Performance-Based Condition of Component 1. This will be achieved by establishing a verification strategy in accordance with the verification protocol and the Project Appraisal Document (PAD), validating and reporting on actual PBC progress and results, and maintaining documentary evidence and records of all verification activities, including datasets generated from sample surveys.

The detailed Terms of Reference (TOR) for the assignment are attached to this request for expressions of interest.

The DepEd now invites eligible consulting firms (“Consultants”) to indicate their interest in providing the Services. Interested Consultants should provide information demonstrating that they have the required qualifications and relevant experience to perform the Services. The shortlisting criteria are:

QUALIFICATIONS	MEANS OF VERIFICATION (MOV)
APPLICABLE EXPERIENCE	
A. At least 10 years of experience similar scope to demonstrate experience of independent verification of government agencies or large private sector firms handling projects with IPF with PBCs and/or modality	SEC registration indicating the year of registration and/or other relevant documents

B. Handled at least 1 contract/ project related to verification of training programs in the last five years	Records of previous engagements or Certificate of completion since CY 2021
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The attention of interested consultants is drawn to Section III, paragraphs, 3.14, 3.16, and 3.17 of the World Bank’s “Procurement Regulations for IPF Borrowers”, dated November 2020) (“Procurement Regulations”), setting forth the World Bank’s policy on conflict of interest. In addition, please refer to the following specific information on conflict of interest related to this assignment:

Consultants shall not be hired for any assignment that would be in conflict with their prior or current obligations to other clients, or that may place them in a position of being unable to carry out the assignment in the best interests of the Borrower. Without limitation on the generality of the foregoing, Consultants shall not be hired under the circumstances set forth below:

- a. a firm that has been engaged by the Borrower to provide Goods, Works, or Non-consulting Services for a project (or an affiliate that directly or indirectly controls, is controlled by, or is under common control with that firm), shall be disqualified from providing Consulting Services resulting from, or directly related to, those Goods, Works, or Non-consulting Services. This provision does not apply to the various firms (Consultants, contractors, or suppliers), which together are performing the contractor’s obligations under a turnkey or design and build contract;
- b. a firm that has been engaged by the Borrower to provide Consulting Services for the preparation or implementation of a project (or an affiliate that directly or indirectly controls, is controlled by, or is under common control with that Consulting firm), shall be disqualified from subsequently providing Goods, Works, or Non-consulting Services resulting from, or directly related to those Consulting Services. This provision does not apply to the various firms (Consultants, contractors, or suppliers), which together are performing the contractor’s obligations under a turnkey or design and build contract;
- c. neither a Consultant (including personnel and sub-consultants), nor an affiliate (that directly or indirectly controls, is controlled by, or is under common control with that Consultant), shall be hired for any assignment that, by its nature, creates a conflict of interest with another assignment of the Consultant;
- d. Consultants (including their experts and other personnel, and sub-consultants), that have a close business or family relationship with a professional staff of the Borrower, or of the project implementing agency, or of a recipient of a part of the Bank’s financing, or any other party representing or acting on behalf of the Borrower, that is directly or indirectly involved in any part of:
 - i. the preparation of the TOR for the assignment;
 - ii. the selection process for the contract; or
 - iii. the supervision of the contract, may not be awarded a contract, unless the conflict stemming from this relationship has been resolved in a manner

acceptable to the Bank throughout the selection process and the execution of the contract.

Consultants may associate with other firms to enhance their qualifications, but should indicate clearly whether the association is in the form of a joint venture and/or a sub-consultancy. In the case of a joint venture, all the partners in the joint venture shall be jointly and severally liable for the entire contract, if selected.

A Consultant will be selected in accordance with the Consultant Qualification Selection (CQS) method set out in the Procurement Regulations.

Further information can be obtained at the address below during office hours *0900 to 1700 hours*.

Expressions of interest must be delivered in a written form to the address below (in person, or by mail, or by fax, or by e-mail) by December 18, 2024.

Bids and Awards Committee I
Attn: Assistant Secretary Malcolm S. Garma
c/o Procurement Management Service-BAC Secretariat Division
Rm. M-512, 5th Floor, Mabini Bldg., DepEd Central Office Complex,
Meralco Avenue, Pasig City, Philippines, 1600
Tel: 8633-9432 or 8636-6542
E-mail: depedcentral.bacsecretariat@deped.gov.ph

July 2017

Teacher Effectiveness and Competencies Enhancement Project (TEACEP)

TERMS OF REFERENCE

A 4-year Contract of a Consultancy Services to Conduct Independent Verification for TEACEP

I. PROJECT BACKGROUND

The Department of Education (DepEd), together with World Bank (WB), developed the Teacher Effectiveness and Competencies Enhancement Project (TEACEP) with loan financing of USD110 million comprised of USD70 million allocation for Performance-Based Conditions (PBCs), and USD40 million allocation for Investment Project Financing (IPF) which is implemented from Fiscal Year (FY) 2023-2028. TEACEP is designed to support the government's priority education reforms, focusing on enhancing teaching quality for literacy, numeracy, and socioemotional skills for kindergarten to grade 6, and ultimately to improve reading and math learning outcomes among elementary students in selected regions in Mindanao. Moreover, the identified Project Development Objective (PDO) is to improve the quality of and equitable access to teaching in Kindergarten to Grade 6 (K-6) in project-supported areas, namely Region IX, Region XII, and Bangsamoro Autonomous Region of Muslim Mindanao (BARMM).

TEACEP is composed of three (3) components to achieve its PDOs:

- 1) Component 1 – Supporting teachers and school leaders in improving teaching practices;
- 2) Component 2 - Providing adequate materials for effective teaching and learning; and
- 3) Component 3 - Project management, monitoring and evaluation.

In terms of project management, monitoring, and reporting of activities and milestones, the Project Management Service (PMS) as the lead implementing office, will collaborate with the Project Implementation Units (PIUs) within DepEd Central Office (CO), Regions IX and XII, and the Ministry of Basic, Higher and Technical Education (MBHTE). A Project Integration Coordination Office (PICO) will be established within PMS comprising of technical staff to be deployed at the CO and at the project-supported regions. The PICO will generally support coordination among the Project Steering Committee (PSC), Project Management Committee (PMC), and Technical Working Groups (TWGs), providing guidance on project outputs and schedules. Further, the PICO and concerned PIUs will work directly with a procured consultancy firm in carrying out the implementation of project activities. The structure of PICO is in Attachment 1.

In support of the achievement of the project objectives, it is necessary to secure various deliverables for the project including goods, non-consulting services, and consulting services through procurement processes. As stipulated in the project's loan agreement, all procurement of goods, non-consulting services, and consulting services funded under the loan whether as part of PBC component or

the expenditure-based component pertaining to IPF must adhere to the WB's Procurement Guidelines for Implementing Agency.

In relation to this, an Independent Verification Consultancy Firm/Agency will be procured to work on the verification of project PBCs.

II. OBJECTIVES OF THE ASSIGNMENT

Project financing will follow the IPF with PBCs guidelines of the WB. This approach allows for flexibility in addressing various project elements. Technical assistance to help achieve PBCs will be addressed through expenditure-based disbursement. The mechanism of PBCs can serve to address policy and the accomplishment of activities not easily addressed through direct interventions under IPF. Out of the USD110 million loan amount, USD70 million is PBC-based. Meanwhile, USD40 million is IPF-based, with the intention of providing DepEd with the technical assistance needed to achieve the PBCs.

The PBC-based USD70 million will be disbursed by WB to the Bureau of Treasury of the Government of Philippines as reimbursements for project expenditure incurred to achieve specified results, defined as PBCs (*see Annex 1 for PBC matrix*), and the achievement of the results. Each PBC has a specific set of disbursement rules and verification protocol, which will guide the timing and level of disbursements for each PBC.

As part of the Loan Agreement between the Government of Philippines and the World Bank, DepEd, as the project implementing agency, shall hire a third-party Independent Verification Agency (IVA) to assist DepEd verify, validate and confirm the achievement of select PBCs (*see Annex 2 for list of PBCs that require third party verification*).

The objective of this assignment is to conduct an independent and transparent verification on the achievement of selected PBCs through:

- a. Establishment of a PBC verification strategy based on the verification protocol described in *Annex 2* and the Project Appraisal Document.
- b. Validate and report on actual PBC achievement and findings.
- c. Maintain documentary evidence and records of all verification activities, including but not limited to datasets generated by sample surveys.

III. SCOPE OF WORK

A. Deliverables

The firm that will work under the guidance of the PICO/PMS of DepEd shall serve as the overall coordinator of the verification process, likewise, it shall work directly with relevant PIUs in the central and field offices. The

deliverables may vary based on possible changes to PBCs as a result of project restructuring:

1. Establish a PBC verification strategy

- Propose a methodology for the sampling of target schools/teachers for verification
- Define data collection tools, frequencies, and timeframes based on work plans in coordination with focal/implementing units and officers responsible for achieving the select PBCs
- Identify an appropriate mix of quantitative and qualitative methods to analyze and interpret data (e.g., methods for in-field spot-checking and cross-referencing of data, as well as a mechanism for responding to missing and/or inaccurate data)
- Identify risks in the verification process and indicative strategies for managing them.

2. Validate and report on actual PBC achievements and findings

- Produce progress reports on PBC achievements and findings based on prescribed format
- Flag potential risks or challenges emerging from verifying information to PMS and other relevant stakeholders
- Document lessons learned and good practices observed in the implementation of the project.

3. Maintain documentary evidence, records and datasets

- Maintain records of all verification activities
- Maintain well-formatted datasets so the computation procedure used can be replicated, if required
- Provide records and data to the PMS upon request.

4. Provide other project verification related reports as may be requested by DepEd Management and WB

B. Expected Outputs and Delivery Schedule

1. ***Inception Report*** *within the first two months after contracting.* The report shall serve as a Work Plan for the duration of the Project, subject to the approval of PMS which and contain the following, but not limited to:
 - A technically sound and flexible sampling framework with a detailed methodology for each of the periodic verification reports
 - An indicative timetable for the field visits, analysis, and report preparation required for the verification of PBCs
2. ***PBC Independent Verification Reports***
 - Verified report of accomplishment of PBC targets

- Significant issues, lessons learned, and recommendations
3. **Consolidation of Annual Verification Reports**
 - Consolidated verification reports of the current year to be submitted a month after the end current year
 - Synthesis of issues, lessons learned, and recommendations
 4. **Final Report**
 - Consolidated verification reports to be submitted at the completion of the project
 - Synthesis of all issues, lessons learned, and recommendations to be included in the Project Completion Report (PCR)
 5. **Electronic database** for all the data collected, used, and reported during the course of project implementation.

All reports shall be submitted in printed and digital copies. The delivery schedule and indicative timetable is indicated in the expected deliverables and timing.

IV. INPUTS PROVIDED BY THE CLIENT

The IVA shall be provided with the following documents to determine initial insight into the project:

1. TEACEP Project Appraisal Document (PAD);
2. TEACEP Updated Project Operations Manual (POM); and
3. This Terms of Reference.

In connection with the PBCs to be verified, the IVA shall also be provided with data, reports and documents (e.g., EMIS data, relevant DepEd memoranda and/or policies, training designs, etc.) by the respective implementing units. The PMS will also arrange, as required, introductions to schools and other offices. The IVA may also use additional reports/inputs to verify PBC achievement, provided that such reports/inputs are approved by PMS.

V. EXPECTED DELIVERABLES AND TIMING

The IVA shall submit the following reports and in one (1) electronic format (by email or USB) and two (2) hard copies adhering to the schedule below:

Deliverables	Timelines	Percentage of Deliverables
Year 1		
Inception Report to be submitted to PICO/PMS	within two-month from the issuance of Notice to Proceed (NTP)	15%
PBC 2 Verification Report to be submitted to PICO/PMS	within 4 months upon receipt of the Attestation Letter of PBC 2	15%

PBC 10 Verification Report to be submitted to PICO/PMS	within 4 months upon receipt of the Attestation Letter of PBC 10	5%
Year 2		
PBC 6 Verification Report to be submitted to PICO/PMS	within 4 months upon receipt of the Attestation Letter of PBC 6	10%
Year 3		
PBC 12 Verification Report to be submitted to PICO/PMS	within 4 months upon receipt of the Attestation Letter of PBC 12	5%
PBC 4 Verification Report to be submitted to PICO/PMS	within 4 months upon receipt of the Attestation Letter of PBC 4	5%
PBC 7 Verification Report to be submitted to PICO/PMS	within 4 months upon receipt of the Attestation Letter of PBC 7	15%
Year 4		
PBC 8 Verification Report to be submitted to PICO/PMS	within 4 months upon receipt of the Attestation Letter of PBC 8	15%
Final Report to be submitted to PICO/PMS	within 1 month upon completion	10%
Turnover of electronic database of all materials used and developed under TEACEP	within 1 month after the acceptance of Final Report	5%
Grand Total		100%

Note: Contract is payable upon achievement of project deliverables, subject to availability of yearly allotment.

VI. FIRM QUALIFICATION

The following are the considerations of the Department of Education in the selection of the service provider:

QUALIFICATIONS	
Interested service providers shall be evaluated accordingly.	
QUALIFICATIONS	MEANS OF VERIFICATION (MOV)
APPLICABLE EXPERIENCE	
C. At least 10 years of experience similar scope to demonstrate experience of independent verification of government agencies or large private sector firms handling projects with IPF with PBCs and/or modality	SEC registration indicating the year of registration and/or other relevant documents
D. Handled at least 1 contract/ project related to verification of training programs in the last five years	Records of previous engagements or Certificate of completion since CY 2021

<p>The IVA's team shall at least comprise of the following key experts and non-key (or an equivalent staffing configuration):</p> <p>A. Key Experts</p> <ul style="list-style-type: none"> i. (1) M&E Specialist (Team Leader) ii. (1) Statistician iii. (1) Education Specialist <p>B. Non-Key Experts</p> <ul style="list-style-type: none"> i. (1) Project Assistant ii. (2) Administrative Staff 	<p>Company Profile, CVs of expert and non-expert personnel, and Organizational Structure</p>	
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VII. TEAM COMPOSITION AND QUALIFICATION REQUIREMENTS FOR THE KEY EXPERTS

This project will require the following key experts and non-key experts:

a. Monitoring and Evaluation Specialist (Team Leader)

- Master's degree preferably in economics, statistics, business administration, or education
- At least 5 years of experience in leading and managing and in-depth knowledge in monitoring and evaluation of education projects preferably in the Philippines, including data collection, management and analysis.
- Preferably have trainings on either project management, leadership, independent verification software/tools or other relevant trainings

b. (1) Statistician

- Bachelor's degree preferably in mathematics, statistics, economics or an IT related fields
- At least 3 years of experience preferably in data analysis, statistical model and methodology, or sampling design
- Preferably have relevant training

c. (1) Education Specialist

- o Bachelor in Elementary Education
- o At least 3 years direct experience in either teaching and education management in elementary education preferably in the Philippines
- o Preferably have relevant training

d. (1) Project Assistant

- Bachelor's degree preferably in project management, education, management, or business administration
- At least 3 years direct experience preferably in data collection and analysis, documentation, or office administration
- Preferably have relevant training

e. (2) Administrative Staff

- Bachelor's degree in any 4-year course
- At least 1-year direct experience administrative roles preferably in the verification industry or related fields
- Preferably have relevant training

VIII. WORKING ARRANGEMENTS

The IVA shall report directly to PMS/PICO, which shall serve as the overall coordinator of the verification process. The IVA is expected to establish sufficient working relationship with the offices implementing the program/project whose PBCs are to be verified at the field levels. While the IVA is expected to work with a broad range of DepEd staff, the IVA shall also collaborate with designated DepEd technical personnel to ensure the transfer of skills that shall form the basis for continuity and sustainability of the processes observed/implemented. Moreover, the consultancy firm shall attend regular meetings with project representatives (PICO, PIUs, WB, Recipient Regions) based on schedule or as needed.

IX. TERMS OF PAYMENT

The payment of the firm shall be made upon the submission of accomplishment report, certificate of service rendered and acceptance of outputs or certificate of retainership signed by the Head of Office or End User following all prescribed accounting rules and regulations.