

# Request for Proposals (RFP) No. MLA-2022-12486-025

USAID Opportunity 2.0 Activity, Philippines

Education Development Center, Inc.
(Hereafter referred to as "EDC")
Request for Proposals for the Procurement of Consulting Services for

AGENDA-SETTING AND FORMULATION OF TESDA'S 5<sup>th</sup> CYCLE NATIONAL TECHNICAL EDUCATION AND SKILLS DEVELOPMENT PLAN (NTESDP) 2023-2028

Date of Issuance: August 30, 2022

# **Company Description**

Education Development Center, Inc. (EDC) is one of the world's leading nonprofit research and development firms. EDC designs, implements, and evaluates programs to improve education, health, and economic opportunity worldwide. Collaborating with both public and private partners, we strive for a world where all people are empowered to live healthy, productive lives.

Opportunity 2.0 (O2), a 5-year program funded by the United States Agency for International Development (USAID), aims to strengthen second-chance education programs for vulnerable out-of-school (OSY) youth in the Philippines. O2 program collaborates and works with national and local systems to provide 180,000 youth with the skills and opportunities to improve their education, employment, and livelihood outcomes.

Achieving this vision will require a multi-faceted, systems-strengthening approach that aligns the formal education system, markets, and youth "sub-systems" at the regional levels. This will be achieved by providing experienced project personnel embedded in government departments; further aligning the input of technical assistance; and maximizing opportunities to bring together the respective stakeholders to identify and refine synergies and transition pathways for youth, particularly between Department of Education (DepEd)'s Alternative Learning System (ALS) program and the Technical Education and Skills Development Authority (TESDA).

# 1. Purpose

The purpose of this RFP is to provide technical assistance to TESDA in the agenda-setting and formulation of its 5th Cycle National Technical Education Skills Development Plan (NTESDP) for 2023-2028. This Plan will serve as a guide for the entire Technical-Vocational Education and Training (TVET) sector, including academe, industry, government, NGOs, and learners, and will support the O2 system strengthening strategies in delivering workforce readiness and technical-vocational training for OSYs and other youth populations in the Philippines. A service provider shall be engaged to develop the agenda and provide expertise and technical assistance in the formulation of the 5th Cycle NTESDP that will set the path for TVET in the next six years.

Under Sec. 21 of RA 7796, TESDA is mandated to formulate a plan for middle-level manpower that will steer different actors in the TVET sector to achieve the objectives of the Plan. As part of the formulation of the Plan, the agency needs to identify, prioritize, and consolidate the effective and dynamic strategies and programs of the next cycle of the NTESDP based on the internal and external analysis of the policy environment, national and international policy directions and trends, along with the inputs from various multi-stakeholder consultations nationwide. Collaboration with different stakeholders in the crafting of the Plan, hence the Inter-Agency inputs shall also be incorporated. This is also to gain ownership and acceptance of the NTESDP from the stakeholders. Events include internal and external (multi-sectoral) consultations and the launch of the Plan.

O2 program supports TESDA in its endeavor to set the agenda and to formulate the next cycle of the NTESDP to ensure that the Philippine TVET sector remains relevant to workplace needs, resilient to disruptions and adaptive to changes in the education and employment spheres. A comprehensive and well-crafted plan that is a product of collaboration of different

stakeholders will help ensure that all players are geared towards the same vision and objectives, that will benefit the youth, citizens and workers, enterprises that will lead to sustainable economic development amidst the challenges of the 4IR, 5IR, and future disruptions.

# 2. Eligibility

This RFP is open to offers from qualified service providers (individual consultants or organizations) incorporated or legally registered under the laws of the Philippines.

#### 3. General Information

## 3.1 Original RFP Document

EDC shall retain the RFP, and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the Offeror's submission or subsequent contract, is grounds for immediate disqualification.

### 3.2 RFP Provisions

- 1. All information provided by EDC in this RFP is offered in good faith. EDC makes no certification that any item is without error. EDC is not responsible or liable for any use of the information or for any claims asserted therefrom.
- 2. This RFP does not under any circumstances commit EDC to pay any costs incurred by the Offeror in the submission of a proposal. This is the Offeror's responsibility.
- 3. All materials submitted in response to this RFP shall become the property of EDC upon delivery to EDC.
- 4. Additional documentation may be required prior to selection.
- 5. All Proposals in response to this RFP and other communications related must be in English.

#### 3.3 Schedule of Events

The following schedule applies to this RFP but may change in accordance with EDC's needs or unforeseen circumstances. Any changes made to the stated timeline will be announced as formal modifications to the RFP.

LINE	TIME	DATE	STEP
A	5:00 PM, Manila time	September 13, 2022	Deadline for request for any clarifications from the EDC. Questions must be submitted in writing via email to <a href="mailto:ProcurementPH@edc.org">ProcurementPH@edc.org</a>
В	5:00 PM, Manila time	September 19, 2022	Estimated date for issuance of any clarifications by EDC. All questions will be answered in one document and sent directly to all Offerors receiving this Request for Proposal
С	5:00 PM, Manila time	September 22, 2022	Deadline for submission of Proposals.

# 4. Proposals Submission and Selection

# 4.1 Offeror's Understanding of the RFP

In responding to this RFP, the Offeror <u>fully</u> understands the RFP in its entirety and in details, including making any inquiries to EDC as necessary to gain such understanding. Clarification questions must be submitted by potential Offerors—in writing— by the date and time designated in <u>Line A</u> of the Chart in Section 3.3. Written responses will be sent directly to all pre-qualified Offerors. EDC reserves the right to disqualify at its sole discretion any Offeror who submits a Proposal that is not responsive or that demonstrates less than such understanding. That right extends to the cancellation of the contract if a contract has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to EDC.

#### 4.2 Communication

Verbal communication shall not be effective. In no case shall verbal communication govern over written communications.

Offerors' inquiries, questions, and requests for clarification related to this RFP are to be directed in writing in English by the date and time designated in <u>Line A</u> of the Chart in Section 3.3 to:

Education Development Center, Inc.

Attention: Procurement Manager

E-mail: <u>ProcurementPH@edc.org</u>

Email subject: "Questions regarding RFP No. MLA-2022-12486-025"

#### 4.3 Proposal Submission

Proposals must be provided on the Offeror's letterhead or stationery and sent by email to:

Education Development Center, Inc.

Attention: Procurement Manager

E-mail: ProcurementPH@edc.org

Email subject: "Proposal in Response to RFP No. MLA-2022-12486-025"

Proposals must have the subject line of "Proposal in response to RFP No. MLA-2022-12486-025" and must include the number of emails (for example, Email 1 of 2, Email 2 of 2, etc.) in the subject line. The Proposal itself must include all documents required by the RFP in Word, Excel, or PDF and those documents must be attached to the email message(s); all attachments must be clearly labeled and must be numbered sequentially in order for EDC to review the Proposal. If the Proposal is sent in more than one email message, the Offeror must send all of the email messages with the Proposal submission on the same day and time the sending of the emails as closely as practicable.

It is the responsibility of the Offeror to ensure timely delivery of the Proposals to EDC by the date and time designated in **Line C** of the Chart in Section 3.3.

# 4.4 Eligibility of Proposals

# 4.4.1 Complete Proposals

Offerors must submit all components required by this RFP, including its annexes, in order for their Proposals to be complete. Before evaluating Proposals, EDC will determine which Proposals include the components required by the RFP to be considered complete Proposals. Please note that although EDC will determine certain Proposals to be complete, this determination does not signify that an award will be made to one or any of the Offerors with complete Proposals. Only complete Proposals will be evaluated and considered for an award.

#### 4.4.2 Past Performance

Offerors may be disqualified if a check of past performance demonstrates that the Offeror has not been able to deliver similar services on time and in a satisfactory manner.

#### 4.5 Evaluation Criteria

EDC will evaluate proposals in accordance with this section and intends to award a contract to the responsible Offeror whose proposal represents the best value to EDC. "Best value" is defined as the offer that results in the most advantageous solution for EDC, in consideration of technical, cost, and other factors. The submitted technical information will be scored by a technical evaluation committee using the technical criteria shown below:

# **Technical Evaluation/Requirement**

	Evaluation Criteria	Max. Points
1.	Past experience in the Philippines to perform services similar to the scope of work required under this RFP	30
2.	Demonstrated capacity of the Offeror's organization to carry out services required under this RFP	35
3.	Organization, reasonableness, timeliness, and ability to complete the Offeror's proposed scope of work required under this RFP	35
	TOTAL POINTS:	100

Cost proposals will be evaluated but will not be assigned a rating. The evaluation of cost will include a determination of cost realism, completeness, and reasonableness. Cost realism is defined as the Offerors' ability to project costs which are realistic for the work to be performed; reflect a clear understanding of the requirements; and are consistent with the Offeror's technical capacity.

Technical and cost will be evaluated relative to each other, as described herein. Technical is significantly more important than cost.

#### 4.6 Selection

EDC may award a contract without discussions with Offerors. As such, Offerors are strongly encouraged to submit their best Proposals with their original submissions. EDC reserves the

right to site visits and/or to conduct discussions, which may result in revisions to Proposals, with one or more than one or all Offeror(s) if EDC determines, at its sole discretion, discussions to be necessary. Discussions may include oral presentations provided by the Offeror.

# 5. Technical Specifications & Requirements

#### 5.1.1 Statement of Work

The **Service Provider** will research, design, and formulate the 5th Cycle National Technical Education and Skills Development Plan with technical inputs from TESDA and different stakeholders for the performance/conduct of the following tasks/activities:

- 1. Development/enhancement of the NTESDP Framework in consideration of the ff:
  - a. international, regional, and national goals and priorities impacting TVET
  - b. identified policy and program priorities in TVET and related sectors
  - c. current and anticipated geo-economic/geo-political environment locally and abroad
- 2. Develop workshop design and provide guidance during the following events:
  - a. Sectoral Validation of the NTESDP agenda
  - b. Visioning Exercise and Planning Workshop
  - c. Internal-External Consultations
- 3. Guidance in the preparation/formulation of the following:
  - a. External-Internal Analysis of the Plan
  - b. Formulation of Planning Guidelines for the Regional-Provincial TESD Plans
  - c. Employment, Industry, Workplace Trends and Skills Priorities
- 4. Formulation of the following:
  - a. Plan Vision and Framework
  - b. Sectoral Policies and Strategies
  - c. Plan Indicators and Targets
  - d. Implementation Strategies
  - e. Monitoring and Evaluation
- 5. Consultation with TESDA and other stakeholders (TESDA Board, inter-agency, national, sectoral) on the Plan framework, content and strategies

Technical Assistance shall likewise be provided in key events in the agenda-setting, formulation of the plan, which include:

Agenda Setting	Sectoral Focus Group Discussions (FGDs) to be facilitated by the  Service Provider  Academe Government Industry Beneficiaries/Learners/ Special Clients Other partners (TESDCs, CSOs, local and international partners
Formulation of the Plan	Internal Consultation

NTESDP Inter-Agency Committee Consultation	
National/Sectoral Consultation	
Layout/Printing of the NTESDP (carried out by TESDA and EDC)	
Launch of the NTESDP	

### **Minimum Qualifications:**

The service provider must meet the following qualifications:

- Advanced degree in public policy, social sciences, international development or related field;
- In-depth knowledge of Philippine and international TVET;
- Demonstrated knowledge of the geo-economic and geo-political environment (local and international) that may have an impact on Philippine TVET;
- At least ten (10) years of experience in conducting research or process evaluation for any government agency;
- Accomplished at least three (3) related researches/studies within the past 5 years.

#### **Duration:**

• The anticipated duration of the firm fixed price contract resulting from this RFP is a maximum of nine (9) months from the award date.

# 5.1.2 Delivery Schedule

The Proposals must be based on the following indicative delivery schedule, taking into account the delivery specified below.

### **Activities of the Service Provider:**

Timeline	Activity	Description	Comments
October 2022	Initial Meeting with TESDA and EDC	Meeting with EDC and TESDA to discuss action plan for the agenda setting / NTESDP formulation.  NTESDP working draft agenda for comments/inputs of the Consultant	With TESDA
November 2022	Presentation/validation of Draft Agenda with TESDA stakeholders	Sectoral FGDs - to be facilitated by the Consultant (face-to-face):	
November –	Conduct of External-	Gathering and consolidation of inputs for the	With TESDA

December 2022	Internal Analysis	E-I Environment and Analysis	
December 2022	Updating, Finalization and Approval of the NTESDP Agenda and Framework	Updating, Finalization and approval of the NTESDP Agenda and Framework for presentation to the Cluster, Inter-cluster, ExeCom	With TESDA
January 2023	Release of R/PTESDP Formulation Guidelines	Crafting and issuance of R/PTESDP Guidelines	With TESDA
January – March 2023	Drafting of the Plan	Gathering inputs for priority strategies, policies, and programs for the Plan	With TESDA
February 2023	Conduct of Internal- External Consultations  Internal Consultation facilitated by the Consultant  - Central Offices - Regional Offices - TESDA Board (can be included in the agenda during the board meeting)		With TESDA
		NTESDP Inter-Agency Committee     (IAC) Consultation	With TESDA
		National / Sectoral Consultation - to be facilitated by the Consultant - Academe - Government - Industry - Beneficiaries/Learners/Special Clients - Other partners (TESDCs, CSOs, local and international partners)	With TESDA
March 2023	Finalization of the NTESDP 2023-2028	Incorporating inputs from the internal and national/sectoral consultations, NTESDP 2018-2022 evaluation report and PDP 2023-2028	With TESDA
April 2023	Presentation of the finalized NTESDP 2023-2028	Final review of the finalized NTESDP 2023- 2028 of the TESDA Cluster, Inter-cluster, ExeCom and TESDA Board	With TESDA
May 2023	Presentation of the NTESDP 2023-2028 to NEDA SDC Board, Technical Board and NEDA SDC Cabinet Level	Approval and Adoption of NTESDP 2023-2028	With TESDA
June 2023	Launching of the NTESDP 2023-2028	Be part of the event/committee that will handle the launch	With TESDA EDC

# **Activities of TESDA:**

Timeline	Activity	Description	Comments
August 2022	NTESDP Agenda	Preparation of the draft agenda based on the	TESDA

	drafted	existing policy recommendations gathered from different studies, fora, consultations	
	Consultation with NTESDP Inter-Agency Committee  Gathering of insights/inputs from representatives of the NTESDP Inter-Agency Committee		TESDA
	Internal Consultation  Conduct of virtual consultation for internal inputs facilitated by the Consultant  Central Offices  Regional Offices  TESDA Board		TESDA
	Presentation of Agenda to the NEDA SDC Technical Board	Presentation of Agenda to the NEDA SDC (for comments and inputs)	TESDA
August – September 2022	Development of the Draft Agenda	Incorporating inputs from the internal consultation, NEDA SDC TB, President's agenda, Secretary's Agenda, and PDP framework, strategies to the Agenda and Framework	TESDA
April 2023	Draft Lay-outing of the NTESDP 2023-2028		TESDA
May 2023	Finalization/Approval of Layout and Printing of the NTESDP 2023- 2028		TESDA/EDC

<sup>\*</sup>This is an indicative timeframe. Actual timeframes will be agreed upon with the successful applicant.

# 5. Proposals Requirements

# 5.1 General Requirements

Offeror must submit:

- 1. A detailed technical proposal explaining the services to meet the needs of EDC as described in Section 4.
- 2. Annex A Organizational Information Form (signed)
- 3. Annex B Organizational Certification (signed)
- 4. CVs of qualified personnel proposed by the Offeror
- 5. A detailed price proposal in accordance with Section 5.2, exclusive of VAT. EDC has a zero-VAT status in the Philippines
- 6. Copy of the valid Business Permit
- 7. Copy of the current DTI or SEC Registration, as applicable
- 8. Copy of the valid BIR Registration
- 9. Price guarantee valid for 60 calendar days

# 5.2 Price Proposals Requirements

Please provide a price summary as displayed below, as well as a narrative describing how the price was calculated. The price summary must be submitted in Excel format and show all formulas.

The price summary, detailed budget, and all discussion of costs, including the budget notes, shall be organized consistent with the cost categories specified below. If there is no proposed cost in a particular category, include 0 for that category.

## 5.3 Detailed Budget & Budget Narrative

The detailed budget must be submitted in Microsoft Excel format and show:

- Each activity referenced in the table under section 5.1.2. Activities of the Service Provider must be costed out separately.
- Each cost within a budget category (e.g., within the direct labor category, there must be a separate line in the budget for each staff position; within the equipment category, there must be a line for each type of equipment, etc.).
- For each line item, the estimated cost per unit, the unit type (e.g. per month, per trip, per person, etc.), the number of units, and the total cost (i.e. the estimated cost per unit multiplied by the number of units); and all formulas.

The budget narrative must include information about how the amounts for each estimated cost were determined.

The following definitions of types of costs should be utilized in preparing the cost proposal.

Labor: Daily labor rates should be proposed as well as number of days.

<u>Consultants:</u> This category is for services rendered by persons who are members of a particular profession or possess a special skill and who are not officers or employees of the offeror. Costs of consultants should be broken down by person days or hours.

<u>Equipment and Supplies:</u> This category is for supplies and equipment. Costs must be broken down by types and units.

<u>Subcontracts:</u> For any proposed subcontract, a budget for the proposed subcontract must be included and the budget must include the budget categories noted above.

Other Direct Costs: Costs such as transportation, supplies directly related to the proposed services.

Indirect Costs: Should not be included and must be identified as direct costs.

<u>Contingency Costs:</u> **contingency costs are not allowed.** Please provide a detailed breakdown of all costs necessary for the implementation of the proposal.

### 6. Contract Type, Payment and Terms

EDC anticipates issuing a fixed price contract with payments made upon submission of agreed-upon deliverables. The selected service provider must agree to abide by the price submitted for the duration of the contract.

Deliverable #	# Deliverable Estimated Timeline		Payment (%) of the total contract amount
1	Initial meeting with EDC and TESDA to discuss action plan for the agenda setting / NTESDP formulation. Comments/inputs for NTESDP working draft agenda submitted.		10%
2	Presentation/validation of Draft Agenda with TESDA stakeholders completed	Nov. 2022	
3	B External-Internal Analysis Completed Nov – Dec 2022		15%
4	Updating, Finalization and Approval of the NTESDP Agenda and Framework Completed	Dec 2022	
5	R/PTESDP Formulation Guidelines Released	Jan 2023	
6	Draft of the NTESDP Plan Completed	Jan – Mar 2023	
7	Internal-External Consultations Conducted	Feb 2023	50%
8	Finalization of the NTESDP 2023- 2028	Mar 2023	
9	Presentation of the finalized draft of NTESDP 2023-2028	Apr 2023	050/
10	NTESDP 2023-2028 Launched	Jun 2023	25%

EDC reserves the right, at its sole discretion, to revise the payment schedule before issuance of a contract.

# **Annex A —Organizational Information Form**

Full legal na	me of the Offeror's company:		
Year the Off	eror's company was established:		
Contact info	rmation regarding the proposal:		
(a)	Individual's full name and title:		
(b)	Full office address:		
(c)	Telephone number:		
(d)	Fax number:		
(e)	Email address:		
Offerors who There is no ca a proposal bu Dun & Bradst	currently have a Dun & Bradstreet Number are requested to provide this information. are not registered with Dun & Bradstreet may do so at http://fedgov.dnb.com/webform. harge for this registration. A Dun & Bradstreet Number is not required for submission of it may be required before a contract is issued. Whether or not an offeror currently has a treet number will not affect the evaluation of the offeror's proposal. Offeror's Dun & umber:		
	g documents must be included in your proposal. ion showing the Offeror's current legal incorporation in the country in which it is l:		
□ A	ttached		
	e Offeror's currently active registration in the Philippines, demonstrating that the can legally operate in the Philippines.		
□ A	uttached		
governing be directors or lorganization program ma significant re	Offeror's key individuals including: (a) the principal officers of the organization's ody (e.g., chairman, vice chairman, treasurer and secretary of the board of board of trustees); (b) the principal officer and deputy principal officer of the (e.g., executive director, deputy director, president, vice president); (c) the nager(s) for the proposed contract; and (d) any other person who will have esponsibilities for administration of the US Government-financed activities or nader the proposed delivery of the services.		
□ A	uttached		
which the of	ail addresses, phone numbers, and contact people at three organizations to feror has provided similar services in scope and value during the last 36 months, can call on as references, and a description of the services provided to each		

organization.

Reference #1:
Organization Name:
Contact Person:
Email Address:
Telephone Number:
Type of Services Provided:
Value of Services Provided:
Month/s and Year During Which Services were Provided:
Reference #2:
Organization Name:
Contact Person:
Email Address:
Telephone Number:
Type of Services Provided:
Value of Services Provided:
Month/s and Year During Which Services were Provided:
Reference #3:
Organization Name:
Contact Person:
Email Address:
Telephone Number:
Type of Services Provided:
Value of Services Provided:
Month/s and Year During Which Services were Provided:
Information regarding any current litigation in which the offeror, or any of the entities in the collaboration, are involved, regardless of jurisdiction where the litigation resides.
☐ Attached ☐ Offeror certifies that it is not currently involved in any litigation

Signature of Authorized Officer:				
Name:		Title:		
Signature:		Date:		

# **Annex B—Organizational Certification**

This certification attests to the Offeror's awareness and agreement to the content of this RFP and all accompanying calendar schedules and terms and provisions contained herein, including but not limited to the payment terms in Section 6.

The Offeror must ensure that this certification is duly completed and correctly executed by an authorized officer of the Offeror's company.

1.	This proposal is submitted in response to an RFP issued by EDC. The undersigned is a duly authorized officer, hereby certifies that:			
-	(Offeror Nam	ne)		
COI	nditions, and prov		sal and agrees to comply with the term The proposal shall remain in effect for e RFP.	
2.	The undersigned	I further certify that their firm (cl	heck one):	
	[]IS NOT			
ent	tity. The undersig		debarment by any United States feder y change in this status, should one occu this procurement action.	
3.	The offeror, by cl	necking the applicable box, cert	tifies that –	
	the laws of the nonprofit org	ne Philippines, [ ] an individual,	rates as [] a corporation organized unde , [] a partnership, [] a nongovernment al educational institution, [] a government n, or [] a joint venture.	al
4.	Offeror agrees to comply with all applicable U.S. federal laws and regulations including those governing affirmative action, E-Verify, equal employment opportunity, use of human participants in research, disabilities, prohibitions against supporting terrorism, prohibitions on human trafficking and prohibitions against discrimination, and, if the value of the contract resulting from this RFP is \$10,000 or more, Executive Order 13496, Notification of Employee Rights Under Federal Labor Laws, see 29 CFR Party 471, Appendix A to Subpart A. Offeror hereby certifies that it is not delinquent on any State or Federal tax Offeror will cooperate with EDC in its efforts to comply with all laws, regulations and any award terms and conditions imposed by EDC by the sponsor(s) of this project.			
5.	Person[s] author	ized to negotiate on behalf of th	nis firm for purposes of this RFP are:	
N	ame:		Title:	
S	ignature:		Date:	_
N	ame:		Title:	_

Signature:		Date:	
Signature of	Authorized Officer:		
Name:		Title:	
Signature:		Date:	

Notification: Under 15 U.S.C. 645(d), any person who misrepresents its firm's size status shall (1) be punished by a fine, imprisonment, or both; (2) be subject to administrative remedies; and (3) be ineligible for participation in programs conducted under the authority of the Small Business Act.