

**BID No. 12/14**

**REQUEST FOR PROPOSALS**

**FOR**

**EVALUATION OF THE INTER-AMERICAN PROGRAM ON EDUCATION FOR DEMOCRATIC VALUES AND PRACTICES (EDUCADEM)**

**DEPARTMENT OF PLANNING AND EVALUATION**

**SECRETARIAT FOR ADMINISTRATION AND FINANCE**

GENERAL SECRETARIAT OF THE ORGANIZATION OF AMERICAN STATES

(GS/OAS)

Department of Procurement

August 8, 2014

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1. **BACKGROUND**
   1. At the request of the US Permanent Mission the Department of Planning and Evaluation (DPE) is coordinating an external evaluation of the Inter-American Program on Education for Democratic Values and Practices. This assessment is part of the DPE greater efforts to conduct formative and summative evaluations of projects and programs executed by the OAS. Such efforts, coordinated and supervised by the DPE, began over 5 years ago with the evaluation of initiatives financed by the Spanish Fund for OAS and has been extended to operations financed by other donors, such as Canada and the United States of America. These evaluations, in addition to systematizing and documenting the results of the interventions, have the goal of capitalizing on these experiences for the improvement of future project and program formulations and designs, and institutionalize best practices in monitoring and evaluation within the Organization.

**Inter-American Program on Education for Democratic Values and Practices.**

* 1. With the support of the US Permanent Mission the Executive Secretariat for Integral Development (SEDI), through the Office of Education and Culture (OEC) –formerly called the Department of Education and Culture, executed the Inter-American Program on Education for Democratic Values and Practices (EDUCADEM). Although EDUCADEM officially started in August of 2005, when at its IV Inter-American meeting the Ministers of Education of Member states adopted the initiative and requested that the Inter-American Committee on Education (CIE), with the support of the OEC, launch the Program, EDUCADEM has its beginning much earlier, when in 2002, the Unit for the Promotion of Democracy of the OAS hired an expert to formulate a preliminary project for the creation of a distance learning course for teachers on the Inter-American Democratic Charter. The project was presented for funding to the US Permanent Mission at the OAS on July 2003. In June 2004, when funds were received, the initiative began to carry out the planning, design and preliminary production of the course. At the end of 2004 the course syllabus had been reviewed and evaluated by experts and key stakeholders in the OAS. A few months before, on March of 2004, the Government of Peru formally expressed its interest in serving as the site for the pilot project and committed in kind contribution to the initiative. The agreement signed between the OAS and Peru had at its core the formation of 1,500 primary and secondary school teachers.
  2. As conceived in 2005, the EDUCADEM program is to support actions in three main areas or components:

1. Research and analysis on the promotion of a democratic culture through education, both formal and non-formal.
2. Professional development and educational resources, including courses, pedagogic methodologies, curriculum, educational materials and techniques to assist in the teaching and learning of democratic values and practices, both in and outside of the school system.
3. Cooperation and information exchange -between different international, national, and local institutions and actors working at different levels in the field of formal and non-formal education for democratic values and practices.
   1. Since its inception the OEC has been in charge of coordinating the execution of the EDUCADEM Program and its components throughout the Americas in direct consultation with an Advisory Board (AB). The AB is integrated by 40 renowned experts in education for democratic citizenship and related areas from around the hemisphere, and its main purpose is to ensure the integrated, effective and efficient program execution through timely guidance and strategic policy level decision making, and to provide oversight regarding the implementation of the Program. Members of the AB include: i) international organizations such as the Inter-American Institute on Human Rights, UNICEF and UNESCO; ii) representatives of Member states’ Education Ministries; and iii) experts from academia and civil society from across the hemisphere.
   2. Such a mandate gave way for accessing resources to support some activities during the first phase of the program. Phase I of EDUCADEM included i) the formation of a coordinating group of ministry representatives; ii) the first meeting of the AB, held in Colombia; iii) the development of a Web Portal for the Program, launched in 2006; iv) a mapping of current policies and programs in education for democratic citizenship in the hemisphere; and v) the organization of an International Seminar on Best Practices in Citizenship Education, held in 2006 in Mexico City.
   3. EDUCADEM has created a hemispheric alliance of ministries of education, civil society organizations, international organizations, universities and private sector organizations working to strengthen education for democratic citizenship through cooperation, research and training. The program hinges on the belief that education is key to strengthening democratic institutions and thus its mission is to promote a culture of democracy through formal and non-formal education. The Inter-American Democratic Charter, adopted by the 34 member states on September of 2001, emphasizes the importance of promoting democratic values to establish a democratic culture and in its article 27 specifies that: "*Special attention shall be given to the development of programs and activities for the education of children and youth as a means of ensuring the continuance of democratic values, including liberty and social justice*".
   4. Since 2006 EDUCADEM has been ratified in several occasions by OAS General Assembly Resolutions and has been recognized at all Declarations emanated from the Inter-American Meetings of Ministers of Education.
   5. Currently the program has identified the need to focus on translating policy into practice, for it is, according to Member states, the biggest challenge to education for democratic citizenship policies and programs, more specifically, in terms of training, curriculum/learning, and cultural transformation.

**Resources**

* 1. According to the available records EDUCADEM has received, since 2005, over US$1.9 million. The US Permanent Mission has contributed so far with US$ 1.2 million. The remaining were resources approved by the Inter-American Committee on Education of the OAS and funding leveraged from outside donors for activities in all three components of the Program.

**Results**

* 1. After more than US$ 1.9 million invested and little more than 5 years executing, EDUCADEM, according to its records from 2005 to 2010, has achieved a number of results covering a wide range of options, among them some of great relevance:

1. Training course for teachers in the implementation of democratic values and practices in their classrooms has been incorporated in Peru’s Ministry of Education portfolio of professional development courses for teachers.
2. Capacity has been built among public officials, particularly within the education sector, to design and carry out more effective public policies in citizenship education.
3. Growing interest of the Ministries in continuing the training of teachers to be able to explain the main tenets underlying the different forms of democracy and apply democratic values, principles and procedures to the classroom, school community, country and region in the participant countries.
4. Initial informal reports indicate that the technical assistance and the promotion of exchange of experiences among Member states have influenced policy and practice in participating institutions, on topics such as student councils, indigenous communities, conflict resolution education and others.
5. EDUCADEM Web Portal developed and used as a reference for OAS documents and educational resources.
6. Increased awareness among officials and NGOs in Member states of current and best practices in citizenship education in local and national contexts across the region.
7. Identification of possibilities for cooperation in the field of education for conflict resolution.
8. Collaboration with the Ministries of Education of OAS Member States was increased.
9. Increased and enhanced policy dialogue in education for democratic citizenship among Permanent Missions and ministries of education.
10. Report published, printed and made available online in 2008, served as a basis for understanding current Member state policies in the field and contributes to dialogue and increased collaboration by clarifying areas for greater focus.
11. **OBJECTIVE**
    1. The objective of this RFP is is twofold: **i)** to assess the results of the Inter-American Program on Education for Democratic Values and Practices (EDUCADEM); and **ii)** to verify the achievements recorded by the program team, by conducting the final evaluation of the program. To this end the consultancy willidentify and measure the results of the program at the output as well as the outcome level.
    2. To achieve the above objective the consultancy shall:

* Conduct a summative evaluation as appropriate in order to estimate the results of the program.
* Determine the efficiency and effectiveness of the program.
* Critically analyze the formulation, design, implementation and financial and administrative management of the program.
* Assess the institutional and financial sustainability of the interventions financed by the program.
* Document the lessons learned from operations related to most phases of the project cycle: formulation, design, implementation, as well as management and sustainability.
* Make recommendations towards improvement of future plans and designs for similar programs.
* Assess if and how EDUCADEM addressed the crosscutting issue of gender perspective and to what results.

Determine the relevance and effectiveness of EDUCADEM vis a vis its mission and the respective mandates of the OAS.

* 1. This RFP does not in any manner whatsoever constitute a commitment or obligation on the part of GS/OAS to accept any Proposal, in whole or in part, received in response to this RFP, nor does it constitute any obligation by GS/OAS to acquire any goods or services.

1. **TERMS OF REFERENCE**

The Terms of Reference (TOR) for the Project are outlined in Appendix 1 of this RFP and, therefore, become part of it.

1. **GOVERNING LAW**

The selection process of the consultant services are regulated by:

* 1. This RFP.
  2. The Procurement Contract Rules of the GS/OAS, approved by Executive Order No. 00-1.
  3. The Performance Contract Rules, approved by Executive Order No. 05-04, Corr. No. 1.
  4. The Executive Orders, memoranda and other dispositions and official documents of the GS/OAS applicable to this process.

1. **BIDDERS’ INQUIRIES**
   1. Bidders may submit any inquiry or request for more information and clarification regarding technical specifications in this RFP no later than five (5) business days prior to the bid closing date.
   2. The requests must be submitted in a written format to the attention of Mr. Alex P. Grahammer, Director of the Department of Procurement (DP), by e-mail to: [oasbidsubmit@oas.org](mailto:OPSBIDSubmittals@oas.org) , [eparada@oas.org](mailto:eparada@oas.org) with copies to [keterovic@oas.org](mailto:keterovic@oas.org) and cmiller@oas.org.
   3. The responses to these requests will be submitted in written format to all Bidders no later than three (3) business days before the bid closing date.
2. **PROPOSAL SUBMISSION**
   1. **Submittal Format**
      1. Proposals shall be submitted in 3 sealed envelopes. The first envelope will contain the Technical Proposal; the second envelope will contain the Price Proposal; and the third envelope will contain the legal documentation required in Section 6.2.3.
      2. The Proposals shall be submitted in hard copy: one (1) original and one (1) copy. The sealed envelope containing Bidder’s Proposal shall be labeled:

**GS/OAS BID No. 12/14** –**EVALUATION OF THE INTER-AMERICAN PROGRAM ON EDUCATION FOR DEMOCRATIC VALUES AND PRACTICES (EDUCADEM)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (*Bidder’s Name*)

* + 1. The Proposals shall be delivered to:

The General Secretariat of the Organization of American States

Department of Procurement

1889 F Street, N.W., 4th Floor

Washington, DC 20006

USA

* + 1. Additionally, the Proposals shall be submitted by electronic mail to the attention of Mr. Alex P. Grahammer, Director a.i. of the Department of Procurement. Proposals sent by e-mail should be in PDF format, sent to oasbidsubmit@oas.org with copies to [eparada@oas.org](mailto:eparada@oas.org); cmiller@oas.org and keterovic@oas.org, and each document, including attachments, that conforms the Proposal must not exceed 15 MB each.
    2. The Proposals shall be signed by the Bidder’s legal representative.
    3. The Proposals shall remain valid and open for acceptance for a period of at least ninety (90) calendar days after date specified for receipt of proposals. The term of validity of the Proposals must be expressly stated on the same Proposal.
    4. By submitting a Proposal, the Bidder gives express warranty of its knowledge and acceptance of RFP and the rules and conditions that governs the bidding process. Likewise, the Bidders shall warrant the accuracy and reliability of all information they submit in this procurement process.
    5. The Bidders shall bear any and all costs or expenses associated with or incurred in the formulation or development of a Proposal in response to this RFP.
  1. **Required Documents and Formats in the Proposals**
     1. Content of the Technical Proposal:

The Technical Proposal shall include the following information/documents:

***Documents related to Contractor’s Experience***

* 1. A general description of the background of the Bidder.
  2. A detailed description of the Bidder’s work experience similar or relevant to this Project. The description shall indicate what work it did, when and where it did it, whom it did it for, and what methods it used.
  3. A minimum of five (5) references from Bidder’s clients to which similar or relevant services were provided during the last three (3) years. These references should include: the name of the client, contact person, telephone and fax numbers and e-mail address, and a description of the work performed and the duration of the project. For this purpose, please use Format 3 of Appendix 3.

***Documents related to Contractor’s Principal Consultant***

* 1. *Curriculum Vitae* of each Consultant proposed by the Bidder Company, which shall show that the minimum requirements provided by the Terms of Reference are met (See Appendix 1).

***Documents related to the Service Offered***

* 1. Work Plan with an indication of the methodology, deliverables, activities to be developed and an estimated timeline for delivery of the requested services, in accordance with the Terms of Reference.

If the Bidder plans to perform the Work with subcontractors and/or in joint venture with other firms, the Work Plan should address the interrelationship of them and how potential inefficiencies such as organization, communications, and process can be avoided. If the form of a joint venture is considered to submit a Proposal, the Technical Proposal should additionally address joint and several liabilities for all partners.

***Other information***

* 1. Information of Bidder’s point(s) of contact. Provide the name, position, telephone number, email, and fax of the person or persons serving as coordinator or focal point of information of the Bidders concerning this bidding process.
  2. Other documentation and/or information that supports each of the technical evaluation factors as per Section 7.4.1, a) of this RFP.
     1. Content of the Price Proposal:

The Price Proposal shall be the total cost offered by the Bidder for the Evaluation of the Inter-American Program on Education for Democratic Values and Practices (EDUCADEM) of the Secretariat for Administration and Finance; which shall be expressed in US Dollars (US$), in numbers and with a description.

1. A Fixed Price Contract will be signed with the prospective Contractor, therefore Price Proposals shall include all anticipated expenses for delivering the consultancy, included but not limed to fee, travel (airfare, hotel, per diem), and other costs associated with cost of executing the activities.
   * 1. Legal Documentation required only for Consulting Firm:
   1. A copy of the Bidder’s certificate of incorporation issued by the competent authority of its country.
   2. A copy of the Bidder’s bylaws.
   3. A copy of the Bidder’s license to do business in the corresponding jurisdiction (if required under the law of the duty station where the work is to be performed).
   4. A copy of the W-9 Form for US Companies and the Employer Identification Number for companies outside of the US.
   5. A copy of the Bidder’s latest general balance sheet of 2012 or 2013; and copy of the Bidder’s latest three (3) audited financial statements, for the years 2011, 2012 or 2013. These financial statements must be signed and/or appropriately certified by the Chief Financial Officer of the Bidder. In addition, the **Bidder’s DUNS number must be provided US registered companies.**
   6. A list of the directors, officers, and the names of any stockholder with more than 50% of the stock.
   7. A statement where Bidder acknowledges that he or she has read and understood the Contractual Terms and Conditions as per Appendix 2 of this RFP. The statement should follow Format 1 of Appendix 3. If the Bidder does not agree with any of the Contractual Terms and Conditions of GS/OAS, he or she should expressly indicate so in its Proposal, offer alternative language, and present the rationale of its proposal.
   8. A disclosure statement of conflict of interest. The statement should follow Format 2 of Appendix 3. In the event of the Bidder intends to subcontract or perform the contract in joint venture, such statement shall be also disclosure by the subcontractors and by each member of the joint venture.
   9. **Closing Date for Receipt of Proposals**
      1. Both the sealed and electronic proposals must be received by the GS/OAS no later than, **10:00 a.m. EST, on September 2, 2014.**
      2. Proposals submitted after the deadline will not be considered.

* 1. **Limited Use of Data**

If the Proposal includes data that the Bidder does not want to disclose to the public for any purpose or used by the GS/OAS except for evaluation purposes, the Bidder shall include in its Proposal a statement signed by its legal representative with the following legend:

*USE AND DISCLOSURE OF DATA*

*This Proposal includes data that shall not be disclosed outside the GS/OAS and shall not be duplicated, used, or disclosed— in whole or in part—for any purpose other than to evaluate this Proposal. If, however, a contract is awarded to this Bidder as a result of—or in connection with—the submission of this data, the GS/OAS shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the GS/OAS' right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [insert numbers or other identification of sheets].*

1. **EVALUATION** 
   1. **Evaluation Authority**

The Proposals will be evaluated by the Contract Awards Committee (CAC) of the GS/OAS.

* 1. **Requests for Clarifications**
     1. In order to enhance the CAC’s understanding of Proposals, allow reasonable interpretation of the Proposal, or facilitate the CAC’s evaluation process, the CAC may submit, in writing, any inquiry or request to the Bidders for explanation, substantiation or clarification of certain aspects of its Proposals.
     2. Likewise, during the evaluation process, the CAC may offer the Bidders an opportunity to eliminate minor irregularities, informalities, or apparent clerical mistakes in its Proposals.
     3. Requests for clarifications shall not be used to cure Proposal deficiencies or material omissions that materially alter the technical or cost elements of the Proposal, and/or otherwise revise the Proposal. Information provided by the Bidder that was not expressly solicited by the CAC through a request for clarification will not be considered during the evaluation.
     4. Inquiries or requests for clarification will be addressed to the point of contact indicated by the Bidders in its Proposal.
  2. **Evaluation Process**
     1. The evaluation of the Proposals will be performed as a whole, in two (2) phases: Technical Evaluation and Price Evaluation. The purpose of the Technical Evaluation is to analyze and evaluate the Technical Proposal, and the purpose of the Price Evaluation is to analyze and evaluate the price offered.
     2. Proposals will be admitted for evaluation only if they comply with the mandatory minimums contained in the TORs. Once admitted, the CAC shall analyze and rate those Proposals using the evaluation factors set forth in paragraph 7.4.
  3. **Award Criteria**

The CAC will review, evaluate, and compare all Proposals according to, but not necessarily limited to, the following criteria:

7.4.1 Technical Criteria:

a) *Relevant Experience:*Bidder’s relevant experience and past performance will be evaluated in respect to past or current efforts similar or relevant to this Project.

b) *Work Plan and Methodology*: Assesses the work methodology, as well as the tools and procedures presented by the Bidder to achieve the objectives of this consultancy.

c) *Experience and Qualification of the Evaluation Team*: The evaluation team must be comprised of at least 3 members, and each one of them must demonstrate a minimum of 10 years’ experience in the following areas: program and project evaluation; distance education (if possible in the training of teachers); and institutional strengthening through the implementation of democratic values and practices in the Americas. In addition, the team should proficient in the use of the Spanish and English language.

le) *References Check:* The GS/OAS will request performanceinformation from Bidder’s previous clients.

f) *Financial Capability*: Assesses the financial condition of the Bidder to perform the Contract through the review of the Bidder’s financial statements.

7.4.2 Price Criteria

a) Price Proposal.

* 1. **Discussions and Negotiations**

Before awarding the Contract, the GS/OAS may choose to negotiate the terms, conditions and deliverables of the Contract with the Bidders that, in the opinion of GS/OAS, are within the competitive range. After the negotiations, the GS/OAS will issue a request for Best and Final Offer (BAFO) so those Bidders will have the opportunity to revise or modify its initial Proposal. The CAC shall analyze and rate those BAFOs using the evaluation factors set forth in Section 7.4 of this RFP.

1. **AWARD**
   1. The trade-off analysis decisional rule will be applied for the evaluation of the Proposals. Under this rule, the GS/OAS will evaluate both price and non-price factors and will award the Contract to the Bidder proposing the combination of factors which offers best value to the GS/OAS. Therefore, the GS/OAS reserves the right to consider award to other than the lowest price bidder or the highest technically rated bidder.
   2. All technical evaluation factors, when combined, are significantly more important than cost or price. The quality and cost will account for 90% and 10%, respectively, of the final score.
   3. The GS/OAS reserves the right to award the contract to multiple contractors rather than a single contractor.
   4. The GS/OAS reserves the right to reject any or all Proposals, and to partially award the Contract.
   5. The award will be notified to the winning Bidder. Such communication shall not be construed as a Contract with the GS/OAS. The award is contingent upon the winning Bidder’s acceptance of the terms and conditions of the proposed Contract, which will be drafted by the GS/OAS based on this RFP and the winning Proposal. Consequently, the Contract shall come into effect when signed by both GS/OAS and the duly authorized representative of the winning Bidder.
2. **CONTRACTUAL TERMS AND CONDITIONS**
   1. **Mistakes**
      1. Contractor shall be liable for improper or incorrect use of the data collected or information disclosed to Contractor by GS/OAS in connection with its Proposal, and/or in connection with any subsequent contract negotiations between GS/OAS and the Contractor.
      2. The data and related information are legal documents and are intended to be used as such.
      3. Contractor takes full responsibility for any errors or mistakes with respect to its bid proposal. Contractor has used its best efforts to ensure the accuracy, reliability and completeness of its proposal, and agrees that any cost of any modification of proposal or contract terms based on Contractor’s error in the information it has provided with its proposal shall be borne solely by Contractor.
   2. **Privileges and Immunities**
      1. Nothing in the Contract shall constitute an express or implied agreement or waiver by the GS/OAS, the OAS, or their personnel of their Privileges and Immunities under the OAS Charter, the laws of the United States of America, or international law.
      2. Contractor is not entitled to any of the exemptions, privileges or immunities, which the GS/OAS may enjoy arising from GS/OAS status as a public international organization.
   3. **Indemnification to Third Parties for Contractor’s Negligent or Wrongful Acts**
      1. Contractor shall fully indemnify and hold harmless the Organization of American States, GS/OAS, and its officials, employees, agents, affiliates, successors and assigns from and against: (i) all claims, damages, actions, liabilities, losses, fines and penalties, and expenses, including but not limited to attorneys' fees, arising out of or resulting from Contractor’s negligence or deliberate wrongful acts in relation to the Contract, and (ii) worker compensation claims and actions presented by Contractor’s employees and agents.
      2. GS/OAS shall notify Contractor as soon as reasonably practicable after any claim covered by this Section is made against it or, with respect to any such claim made against any other person or identity entitled to indemnification under the Contract, within a reasonably practicable time after having been notified of that claim.
      3. Contractor is liable to GS/OAS and shall indemnify GS/OAS for losses to GS/OAS’ property sustained through any acts committed by Contractor's employees, agents, and/or subcontractors acting alone or in collusion. Such acts include, but are not limited to, actual destruction, disappearance, or wrongful abstraction of property, money, or securities.
      4. The provisions of this Section shall not be so construed as to affect any waiver of subrogation rights on the part of any insurance company, as provided in any policy of insurance covering GS/OAS.
   4. **Due Diligence and Information on the Contract**
      1. By submitting a Proposal, the Bidder represents and warrants that it has studied and is thoroughly familiarized with the requirements and specifications of the Contract in their entirety. This includes familiarity with the Contract Documents attached to the RFP, with all current equipment, labor, material market conditions, and with applicable laws, such that the Bidder accepts responsibility for and is prepared to execute and shall completely fulfill all obligations under the Contract.
      2. By submitting a Proposal, the Bidder also accepts that it will not make any claim for or have any right to damages because of any misinterpretation or misunderstanding of the Contract, or because of any information which is known or should have been known to the Bidder.
   5. **Key Personnel**
      1. The personnel listed in the Contractor’s Proposal are considered essential to the work being performed under this Contract. Before removing, replacing, or diverting any of the specified personnel, the Contractor shall (1) notify the GS/OAS reasonably in advance and (2) submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on this Contract.
      2. The Contractor shall make no diversion without the GS/OAS' written consent; provided, that the GS/OAS may ratify in writing the proposed change, and that ratification shall constitute the GS/OAS' consent required by this clause.
   6. **Subcontractors**
      1. The Contractor may enter into a contract or contractual action for the purpose of obtaining supplies, materials, equipment, or services under the Contract.
      2. GS/OAS’ written consent is required for the Contractor to enter into a particular subcontract.
      3. Contractor is fully responsible for Contract performance, regardless of any team arrangement between the Contractor and its Subcontractors.
   7. **Other Contractual Terms and Conditions**
      1. Appendix 2 of this RFP contains the Contractual Terms and Conditions of GS/OAS’ standard Performance Contract (CPR).
      2. No changes to the General Terms and Conditions shall be accepted after the contract award. Once the Contract is awarded, the Contractor shall be bound by the General Terms and Conditions either as stated herein in the RFP or as mutually modified by the Parties.

**APPENDIX 1**

**TERMS OF REFERENCE**

**EVALUATION OF THE INTER-AMERICAN PROGRAM ON EDUCATION FOR DEMOCRATIC VALUES AND PRACTICES (EDUCADEM)**

1. **Justification and Objectives**
   1. The purpose of this consultancy is twofold: **i)** to assess the results of the Inter-American Program on Education for Democratic Values and Practices (EDUCADEM); and **ii)** to verify the achievements recorded by the program team, by conducting the final evaluation of the program. To this end the consultancy willidentify and measure the results of the program at the output as well as the outcome level.
   2. To achieve the above objective the consultancy shall:

* Conduct a summative evaluation as appropriate in order to estimate the results of the program.
* Determine the efficiency and effectiveness of the program.
* Critically analyze the formulation, design, implementation and financial and administrative management of the program.
* Assess the institutional and financial sustainability of the interventions financed by the program.
* Document the lessons learned from operations related to most phases of the project cycle: formulation, design, implementation, as well as management and sustainability.
* Make recommendations towards improvement of future plans and designs for similar programs.
* Assess if and how EDUCADEM addressed the crosscutting issue of gender perspective and to what results.
* Determine the relevance and effectiveness of EDUCADEM vis a vis its mission and the respective mandates of the OAS.

1. **BACKGROUND**
   1. At the request of the US Permanent Mission the Department of Planning and Evaluation (DPE) is coordinating an external evaluation of the Inter-American Program on Education for Democratic Values and Practices. This assessment is part of the DPE greater efforts to conduct formative and summative evaluations of projects and programs executed by the OAS. Such efforts, coordinated and supervised by the DPE, began over 5 years ago with the evaluation of initiatives financed by the Spanish Fund for OAS and has been extended to operations financed by other donors, such as Canada and the United States of America. These evaluations, in addition to systematizing and documenting the results of the interventions, have the goal of capitalizing on these experiences for the improvement of future project and program formulations and designs, and institutionalizing best practices in monitoring and evaluation within the Organization.

**Inter-American Program on Education for Democratic Values and Practices.**

* 1. With the support of the US Permanent Mission the Executive Secretariat for Integral Development (SEDI), through the Office of Education and Culture (OEC) –formerly called the Department of Education and Culture, executed the Inter-American Program on Education for Democratic Values and Practices (EDUCADEM). Although EDUCADEM officially started in August of 2005, when at its IV Inter-American meeting the Ministers of Education of Member states adopted the initiative and requested that the Inter-American Committee on Education (CIE), with the support of the OEC, launch the Program, EDUCADEM has its beginning much earlier, when in 2002, the Unit for the Promotion of Democracy of the OAS hired an expert to formulate a preliminary project for the creation of a distance learning course for teachers on the Inter-American Democratic Charter. The project was presented for funding to the US Permanent Mission at the OAS on July 2003. In June 2004, when funds were received, the initiative began to carry out the planning, design and preliminary production of the course. At the end of 2004 the course syllabus had been reviewed and evaluated by experts and key stakeholders in the OAS. A few months before, on March of 2004, the Government of Peru formally expressed its interest in serving as the site for the pilot project and committed in-kind contribution to the initiative. The agreement signed between the OAS and Peru had at its core the formation of 1,500 primary and secondary school teachers.
  2. As conceived in 2005, the EDUCADEM program is to support actions in three main areas or components:
  3. Research and analysis on the promotion of a democratic culture through education, both formal and non-formal.
  4. Professional development and educational resources, including courses, pedagogic methodologies, curriculum, educational materials and techniques to assist in the teaching and learning of democratic values and practices, both in and outside of the school system.
  5. Cooperation and information exchange -between different international, national, and local institutions and actors working at different levels in the field of formal and non-formal education for democratic values and practices.
  6. Since its inception the OEC has been in charge of coordinating the execution of the EDUCADEM Program and its components throughout the Americas in direct consultation with an Advisory Board (AB). The AB is integrated by 40 renowned experts in education for democratic citizenship and related areas from around the hemisphere, and its main purpose is to ensure the integrated, effective and efficient program execution through timely guidance and strategic policy level decision making, and to provide oversight regarding the implementation of the Program. Members of the AB include: i) international organizations such as the Inter-American Institute on Human Rights, UNICEF and UNESCO; ii) representatives of Member states’ Education Ministries; and iii) experts from academia and civil society from across the hemisphere.
  7. Such a mandate gave way for accessing resources to support some activities during the first phase of the program. Phase I of EDUCADEM included i) the formation of a coordinating group of ministry representatives; ii) the first meeting of the AB, held in Colombia; iii) the development of a Web Portal for the Program, launched in 2006; iv) a mapping of current policies and programs in education for democratic citizenship in the hemisphere; and v) the organization of an International Seminar on Best Practices in Citizenship Education, held in 2006 in Mexico City.
  8. EDUCADEM has created a hemispheric alliance of ministries of education, civil society organizations, international organizations, universities and private sector organizations working to strengthen education for democratic citizenship through cooperation, research and training. The program hinges on the belief that education is key to strengthening democratic institutions and thus its mission is to promote a culture of democracy through formal and non-formal education. The Inter-American Democratic Charter, adopted by the 34 member states on September of 2001, emphasizes the importance of promoting democratic values to establish a democratic culture and in its article 27 specifies that: "*Special attention shall be given to the development of programs and activities for the education of children and youth as a means of ensuring the continuance of democratic values, including liberty and social justice*".
  9. Since 2006 EDUCADEM has been ratified in several occasions by OAS General Assembly Resolutions and has been recognized at all Declarations emanated from the Inter-American Meetings of Ministers of Education.
  10. Currently the program has identified the need to focus on translating policy into practice, for it is, according to Member states, the biggest challenge to education for democratic citizenship policies and programs, more specifically, in terms of training, curriculum/learning, and cultural transformation.

**Resources**

* 1. According to the available records EDUCADEM has received, since 2005, over US$1.9 million. The US Permanent Mission has contributed so far with US$ 1.2 million. The remaining were resources approved by the Inter-American Committee on Education of the OAS and funding leveraged from outside donors for activities in all three components of the Program.

**Results**

* 1. After more than US$ 1.9 million invested and little more than 5 years executing, EDUCADEM, according to its records from 2005 to 2010, has achieved a number of results covering a wide range of options, among them some of great relevance:

1. Training course for teachers in the implementation of democratic values and practices in their classrooms has been incorporated in Peru’s Ministry of Education portfolio of professional development courses for teachers.
2. Capacity has been built among public officials, particularly within the education sector, to design and carry out more effective public policies in citizenship education.
3. Growing interest of the Ministries in continuing the training of teachers to be able to explain the main tenets underlying the different forms of democracy and apply democratic values, principles and procedures to the classroom, school community, country and region in the participant countries.
4. Initial informal reports indicate that the technical assistance and the promotion of exchange of experiences among Member states have influenced policy and practice in participating institutions, on topics such as student councils, indigenous communities, conflict resolution education and others.
5. EDUCADEM Web Portal developed and used as a reference for OAS documents and educational resources.
6. Increased awareness among officials and NGOs in Member states of current and best practices in citizenship education in local and national contexts across the region.
7. Identification of possibilities for cooperation in the field of education for conflict resolution.
8. Collaboration with the Ministries of Education of OAS Member States was increased.
9. Increased and enhanced policy dialogue in education for democratic citizenship among Permanent Missions and ministries of education.
10. Report published, printed and made available online in 2008, served as a basis for understanding current Member state policies in the field and contributes to dialogue and increased collaboration by clarifying areas for greater focus.
11. **ACTIVITIES**
    1. This consultancy will be coordinated and supervised by the Department of Planning and Evaluation (DPE).
    2. The consulting firm shall work in close cooperation with SEDI/OAS, who in turn will designate a member of their staff to facilitate the evaluation process. The evaluation process will take a participatory approach and take account of the views of all key stakeholders. In general the evaluation will be based on interviews, analysis of documents, field visits, use of relevant evaluation instruments (i.e. application of surveys, focus groups, etc.) and all available data sources, as required. In addition, the consultancy shall:
    3. Develop and submit a first draft of a detailed **work plan** for the consultancy, including the description of the activities to be carried out and its products, a schedule of activities and deliverables. Such work plan will start with an inception mission.
    4. Conduct an **inception mission to OAS headquarters** to meet with key stakeholders directly related to the execution of the program.
    5. Develop an **evaluation framework** for the assessment of EDUCADEM performance. Among others the evaluation framework should include:
       1. A description of the methodology or design of evaluation strategy, including the sampling framework to be used for the collection of data; and the evaluation matrix. The evaluation methodology must consider qualitative and quantitative measurements.
       2. Data collection protocols and analysis of information.
       3. Data collection instruments.
       4. The identification and measurement of output and outcome indicators (initial, intermediate and final) to measure the program´s efficiency and effectiveness, in addition to those previously identified during the design of EDUCADEM, if any. Both groups of indicators are expected to include their definition and methodologies for the collection and calculation.
       5. The instruments for the collection of information and related materials.
       6. The final work plan for the collection, analysis and production of reports;
       7. The table of contents of the final report, among others.
    6. Review all relevant documents necessary to perform the evaluation, including: program documents; progress reports; and financial reports; among others.
    7. Conduct interviews and collect information from key stakeholders, including: OAS staff members; US Mission officials; government officials, and direct and indirect beneficiaries of EDUCADEM.
    8. Validate the chain of results (logic model) for the program, by determining if it was adequate and valid for the expected and actual results.
    9. Assess the technical and economic feasibility of the program, including the sustainability of its benefits.
    10. Conduct an analysis on the relevance and effectiveness of EDUCADEM vis a vis its mission and the respective mandates of the OAS.
    11. Establish the program´s efficiency and effectiveness, identifying lessons learned and making recommendations for future executions. This assessment should include a cost-benefit analysis of the program.
    12. Assess if and how the rotation of personnel directly involved in the execution of EDUCADEM affected the program´s efficiency and effectiveness. In addition the consultancy should determine if the members of the Program Executing Unit had the manpower and the capacity to execute such operation.
    13. Assess the management of the program in the use of planning and implementation tools such as annual operations plans, results matrix/logical frameworks, and program monitoring reports among others.
    14. Determine the relevance of the criteria used for the targeting of beneficiaries; including member countries benefiting from the program and make appropriate recommendations for similar programs in the future.
    15. Analyze how and if the program incorporated a gender perspective approach in the execution of its components, and if there were any such efforts determine how consequential it was.
    16. Conduct field visits as required to a minimum of 5 countries representative of the region directly benefited by the program. In addition, the consultancy shall travel to OAS headquarters to present the midterm and final reports.
12. **Outputs, delivery requirements and Schedule of payments**
    1. The consultancy should generate the following products in accordance to section III:
       1. A draft detailed work plan.
       2. An evaluation framework to assess the efficiency and effectiveness of the program.
       3. A mid-term report and PowerPoint presentation including all analysis described in section III.
       4. A final assessment of the program. The final report: (i) should not exceed 80 pages (letter size and font Times New Roman 12); (ii) should be accompanied by an executive summary of no more than 5 pages; (iii) should include without limitation, any annexes the consulting team deems appropriate; and (iv) should be delivered in electronic format.
    2. The consultancy will have the following payment schedule and perform the following deliveries:
       1. **20%** upon the ***signing of the contract***.
       2. **20%** upon the delivery and approval by OAS of an ***evaluation framework***, including the work plan and the protocol and instruments for the evaluation of program results.
       3. 3**0%** upon the delivery and approval by OAS of a ***mid-term report*** including, among others a brief summary of the planning and progress on the measurement of program results and indicators, and a PowerPoint presentation in OAS headquarters.
       4. **30%** upon the delivery and approval by OAS of a ***final report*** on program results, and a PowerPoint presentation in OAS headquarters.
13. **QUALIFICATIONS AND SELECTION OF THE EVALUATION TEAM** 
    1. The evaluation team must be comprised of at least 3 members, and each one of them must demonstrate a minimum 10 years’ experience in the following areas: program and project evaluation; distance education (if possible in the training of teachers); and institutional strengthening through the implementation of democratic values and practices in the Americas. In addition, the team should be proficient in the use of the Spanish and English language.
14. **Procurement Process and Evaluation Criteria**
    1. The selection process will follow the procurement policies and procedures contained in the various policy documents of the GS/OAS, thus ensuring the application of the principles of competitiveness and transparency with the ultimate goal of awarding the contract to the firm with more merit. The method to be used to evaluate proposals will be the Quality- and Cost- Based Selection (QCBS). QCBS uses a competitive process among participants, which takes into account the quality of the proposal and the cost of services. The quality and cost will account for 90% and 10%, respectively, of the final score.
    2. The Department of Planning and Evaluation will put together a team of at least four members to assess the technical proposals submitted for the consideration of the Contract and Awards Committee Members of the General Secretariat of the OAS. The team will assess the following criteria:

## Specific experience of the team pertinent to the tasks within the TORs;

## Methodology and work plan proposed in response to the terms of reference, including:

## Technical approach and methodology,

## Work Plan, and

## Organization and staffing

## Qualifications of key consultants and work competency, considering the following sub-criteria: a) General qualifications, b) work competency, c) experience in the region and d) oral and written knowledge of Spanish and English language.

1. **Duration**
   1. **Duration:** The consultancy shall last 140 non-consecutive working days between September, 2014 and May, 2015.

## APPENDIX 2

**CONTRACTUAL TERMS AND CONDITIONS**

* 1. Contractor is neither an employee nor a staff member of GS/OAS and is not entitled to any of the rights, benefits, and emoluments of GS/OAS staff members.
  2. Contractor undertakes to perform Contractor’s functions under this Contract and to regulate Contractor’s conduct in conformity with the nature, purposes, and interests of the GS/OAS. Contractor shall complete the Work in accordance with the highest professional standards and shall conform to all governmental pertinent laws and regulations.
  3. Contractor accepts full legal responsibility for the Work, including all liability for any damages or claims arising from it, and agrees to hold GS/OAS and its staff members harmless from all such damages or claims.  Contractor shall provide certificates of insurance coverage as GS/OAS may require for proof of ability to cover such liability.
  4. Contractor does not legally represent GS/OAS, shall not hold himself out as having such powers of representation, and shall not sign commitments binding GS/OAS.

5. Contractor shall not have any title, copyright, patent, or other proprietary rights in any Work furnished under this Contract.  All such rights shall lie with GS/OAS. At the request of GS/OAS, the Contractor shall assist in securing the intellectual property rights produced under this Contract and in transferring them to GS/OAS.

6. All information (including files, documents, and electronic data, regardless of the media it is in) belonging to GS/OAS and used by Contractor in the performance of this Contract shall remain the property of GS/OAS. Unless otherwise provided in the Terms of Reference (Appendix I), Contractor shall not retain such information, and copies thereof beyond the termination date of this Contract, and Contractor shall not use such information for any purpose other than for completion of the Work.

7. Administrative Memorandum No. 90 "Information Systems Security Policy", Executive Order No. 95-07 "Prohibitions against Sexual Harassment", and Executive Order No. 05-07 “Prohibition Against Workplace Harassment”, are readily available at <http://www.oas.org/legal/intro.htm>.  Contractor certifies that he has read those documents and agrees to comply fully with them.

8. The Gross Compensation paid Contractor constitutes full consideration for the Work.  It covers all fees, expenses, and costs incurred by Contractor in providing the Work, as well as Contractor's direct compensation for same.

9. Because Contractor is an independent contractor, GS/OAS is not responsible for providing social security, workmen's compensation, health, accident and life insurance, vacation leave, sick leave, or any other such emoluments for Contractor and his employees under this Contract.  Contractor is solely responsible for providing those benefits, and the Parties have agreed upon the Gross Compensation hereunder to enable Contractor to satisfy that responsibility.  At the request of GS/OAS, the Contractor will provide satisfactory evidence of workman's compensation and other insurance coverage that may be required for all its employees or such Contractors.

10. Contractor warrants that his performance of the Work will not violate applicable immigration laws, and Contractor shall not employ any person for the performance of this Contract where such employment would violate those laws.

11. Unless otherwise specified in this Contract, Contractor shall have the sole responsibility for making Contractor’s travel, visa, and/or customs arrangements related to and/or required for the performance of this Contract, and GS/OAS shall have no responsibility for making or securing such arrangements.

12. This Contract shall be null and void in the event the Contractor is unable to obtain a valid visa and other permits or licenses necessary to complete the Work in the country where the Contract is to be performed.

13. Unless otherwise specified in this Contract, Contractor shall neither seek nor accept instructions regarding the Work from any government or from any authority external to the GS/OAS. During the period of this Contract, Contractor may not engage in any activity that is incompatible with the discharge of Contractor’s obligations under this Contract. Contractor must exercise the utmost discretion in all matters of official business for GS/OAS.  Contractor may not communicate at any time to any other person, government, or authority external to GS/OAS any information known to him by reason of his association with GS/OAS which has not been made public, except in the course of the performance of Contractor’s obligations under this Contract or by written authorization of the Secretary General or his designate; nor shall Contractor at any time use such information to private advantage. These obligations do not lapse upon Contract termination. Failure to comply with these obligations is cause for termination of this Contract.

14. Unless specifically provided for in this Contract[[1]](#footnote-1) in accordance with CPR Rule 5.13.1, the Contractor may not directly supervise a GS/OAS staff member or direct a project or mission that requires the Contractor to supervise GS/OAS staff members.

15. Contractor shall not openly participate in campaign activities for or otherwise openly support and or promote any candidate for elected positions in the OAS; nor shall Contractor use the facilities of the GS/OAS and/or its staff provided to him under this Contract to support and promote the candidacy of any candidate for an elected position in the OAS.

16. GS/OAS may terminate this Contract for cause with five days notice in writing to the Contractor.  Cause includes, but is not limited to: failure to complete the Work in accordance with professional standards or to otherwise deliver conforming goods and services; failure to meet deadlines; conduct which damages or could damage relations between the OAS and a member state; fraudulent misrepresentation; criminal indictment; sexual harassment; workplace harassment; bankruptcy; conduct incommensurate with the requirements for participation in OAS activities; and breach of any of the provisions of this Contract.

17. Either party may terminate this Contract for unforeseen circumstances by giving at least thirty days notice in writing to the other.  Unforeseen circumstances include, but are not limited to, modifications to the Program-Budget of the OAS; lack of approved funds in the OAS Program-Budget for the corresponding program or project; failure of a donor to provide fully the specific funds which were to finance this Contract; an act of God; and the Secretary General’s or a member state's desire to discontinue the Work.

18. In the event this Contract is terminated with or without cause, Contractor shall submit to GS/OAS all of the Work completed and shall receive payment for only that portion of the Work completed to the satisfaction of GS/OAS up until the date of termination.

19. Contractor certifies that:

1. Neither the Contractor nor any of its senior officers and employees, on the date of the signing of this Contract, is a relative of any GS/OAS staff member above the P-3 level or of a representative or delegate to the OAS from an OAS Member State.  The term “relative” includes spouse, son or daughter, stepson or stepdaughter, father or mother, stepfather or stepmother, brother or sister, half-brother or half-sister, stepbrother or stepsister, father or mother-in-law, son or daughter-in-law, brother or sister-in-law.
2. He is not incompetent to enter into this Contract, is not on trial in a criminal court of any of the member states, and has never been convicted of a felony or of any crime involving dishonesty, fraud or theft in any member state.
3. Completion of the Work shall not interfere with the completion of work for which he is responsible under any other contract with GS/OAS.

20. Contractor shall not employ a staff member of GS/OAS or a relative of a staff member as defined in Paragraph 19 (a) above to perform the Work, nor shall Contractor permit any staff member of GS/OAS or any relative of the staff member, as defined in that Paragraph, to receive any personal financial benefit deriving from this Contract or the Contractor's contractual relationship with GS/OAS.

21. Contractor shall not assign this Contract or any element thereof, without the prior written consent of GS/OAS.

22. Upon written notice by either Party to the other, any dispute between the Parties arising out of this Contract may be submitted to either the Inter-American Commercial Arbitration Commission or the American Arbitration Association, for final and binding arbitration in accordance with the selected entity’s rules.  The law applicable to the Arbitration proceedings shall be the law of the District of Columbia, USA, and the language of the arbitration shall be English.

23. Nothing in this Contract constitutes an express or implied waiver by GS/OAS of its privileges and immunities under the laws of the United States of America or international law.

24. This Contract shall enter into effect on the date on which it is signed by both Parties. Provided, further, that this Contract shall have no legal effect until it has been signed by both Contractor and a duly authorized representative of the GS/OAS.

25. The law applicable to this Contract is the law of the District of Columbia, USA.

26. This Contract, including Appendixes I-III, constitutes the entire agreement between the Parties, and any representation, inducement, or other statements not expressly contained herein shall not be binding on the Parties and shall have no legal effect.

27. The masculine terms employed in this Contract should be understood to apply to males, females and legal persons; singular pronouns should be understood to apply to the plural, when appropriate.

**APPENDIX 3**

**FORMAT 1**

**ACCEPTANCE OF THE CONTRACTUAL TERMS AND CONDITIONS statement**

General Secretariat of the Organization of American States

1889 F Street, N.W., 4th Floor,

Washington, D.C. 20006

USA

Attention: Department of Procurement

Subject: BID 12/14 –EVALUATION OF THE INTER-AMERICAN PROGRAM ON EDUCATION FOR DEMOCRATIC VALUES AND PRACTICES (EDUCADEM)

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, representative of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Bidder’s name)*, declare that \_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Bidder’s name)* has read, understood and accepted the Contractual Terms and Conditions as per Appendix 2 of the Request of Proposals of BID 12/14.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**APPENDIX 3**

**FORMAT 2**

**Conflict of Interest statement**

General Secretariat of the Organization of American States

1889 F Street, N.W., 4th Floor,

Washington, D.C. 20006

USA

Attention: Department of Procurement

Subject: BID 12/14 –EVALUATION OF THE INTER-AMERICAN PROGRAM ON EDUCATION FOR DEMOCRATIC VALUES AND PRACTICES (EDUCADEM)

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, representative of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Bidder’s name)*, declare that \_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(Bidder’s name)* does not fall under the following prohibitions:

1. A staff member of GS/OAS;
2. Any person who has held the post of Secretary General or Assistant Secretary General, or a position of trust unless the contract is approved by the Secretary General or the Chief of Staff of the Secretary General;
3. Any delegate, diplomatic representative, or other government employee of an OAS Member State;
4. Any relative of a GS/OAS staff member above the P-3 level or a relative of any other GS/OAS staff member who has authority to issue the subject contract;
5. Any relative of a representative or delegate of a Member State to the OAS;
6. Any person who has entered into a performance contract terminated by GS/OAS for cause under Chapter 8 of the Performance Contract Rules;
7. Any person employed by an institution that is receiving funds from the GS/OAS as part of a GS/OAS project, except in those cases where the employee is on leave without pay from that institution;
8. Any person who is legally incompetent; any person who is on trial in a criminal court of any OAS Member State; or any person convicted of a serious criminal offense in one of the Member States;
9. Any person who has defaulted on and/or failed to perform satisfactorily an existing or previous performance contract or procurement contract with GS/OAS;
10. Any person who does not have a valid visa to work in the country where the performance contract is to be performed and who cannot obtain one prior to the contract initiation date;
11. Any elected official of an OAS Organ, unless the performance contract is not for or in relation to the organ on which the official serves.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**APPENDIX 3**

**FORMAT 3**

**COMERCIAL REFERENCES**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Nº** | **Name of the Company** | **Telephone, Address and**  **e-mail address** | **POC** | **Description of the Consultancy** | **Duration of the project (mm/yyyy – mm/yyyy)** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |

1. Any such provision must comply with the requirements of CPR Rule 5.13.1 in Executive Order No. 05-04, Corr. No. 1 at <http://www.oas.org/legal/english/gensec/EXOR0504CORR1.doc>. [↑](#footnote-ref-1)