



CARIBBEAN EXAMINATIONS COUNCIL

HEADQUARTERS - The Garrison, St Michael BB14038, Barbados
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In reply please quote our ref: 2/14/02

5 October 2011

Request for Proposals – Short-term ‘Education Statistical Consultant’

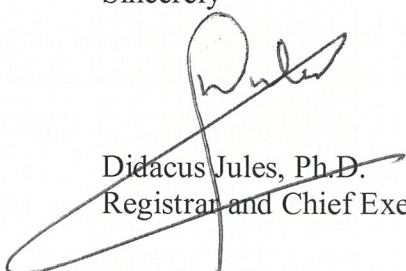
The Caribbean Examinations Council (CXC[®]) invites interested parties to submit proposals for an education statistical consultancy. The complete Request for Proposals (RFP) is attached to this letter of invitation. It includes:

- Tender Instructions
- Annex I - Terms of Reference
- Annex II - Financial Proposal Template

Proposals must be submitted as specified under section 1.4 of the RFP. On the basis of these proposals, a Consultant will be selected in accordance with CXC's tender evaluation procedures. The costs of preparing the proposal are not reimbursable as a direct cost of the assignment.

CXC is not bound to accept any of the proposals submitted, and reserves the right to annul the selection process at any time, without thereby incurring any liability.

Sincerely



Didacus Jules, Ph.D.
Registrar and Chief Executive Officer

DJ/ms

CSEC[®]

CAPE[®]

CCSLC[®]

CVQ[®]

REQUEST FOR PROPOSALS

EDUCATION STATISTICAL CONSULTANT

TENDER INSTRUCTIONS

1. Preparation of Proposals

1.1. Preparation of Technical Proposal

The Technical Proposal shall NOT include any financial information. Technical proposals should be concisely presented and structured in the following order to include, but not necessarily limited to, the following information:

- *Proposed Methodology/Interpretation of Terms of Reference*
Describe in detail the manner in which you would approach the development of the assignment and the estimated completion time of each phase based on the ‘Terms of Reference’ (Annex I).
- *Brief Description of Qualifications and Experience*
Provide a brief description of your relevant qualifications and an outline of recent consultancies or past work of a nature related or similar to the assignment; as well as experience beyond the scope of this assignment.
- *References*
A list of three (3) referees must be submitted with your technical proposal. Referees should be from organizations you have done business with in the past five (5) years on projects with a similar scope. The following information must be included:
 - referee name;
 - position and company name;
 - phone and fax numbers; and
 - address (including email and mailing address)

1.2. Preparation of Financial Proposal

The Financial Proposal must be prepared in accordance with the requirements outlined in this RFP. The Financial Proposal should list all expected costs associated with the assignment using the format in the specimen ‘Financial Proposal Schedule’ (Annex II). All costs must be expressed in “United States dollars”. Proposals must remain valid for 60 days after the date of submission.

CXC is an IT-intelligent organization and would look favorably on optimization of available information and communication technologies (ICTs) in the implementation of this consultancy.

1.3. Clarification and Communication on RFP

It is the responsibility of the bidder to inquire about any requirement of this RFP that is not understood. Tenderers may request clarification on the RFP up to three (3) days before the date for submission of proposals. Requests for clarification should be sent via electronic mail to: msealy@cx.org.

1.4. Submission of Proposals

Tenderers are required to submit an original and three copies of their proposal. Proposals must be submitted using the double envelope system, that is:

- Envelope A should be labelled "*Education Statistical Consultant - Technical Proposal*" and should contain all parts of the technical proposal;
- Envelope B should be labelled "*Education Statistical Consultant - Financial Proposal*" with the warning "DO NOT OPEN WITH THE TECHNICAL OFFER."
- Both envelopes should be placed into an outer, sealed envelope and clearly marked, "Proposal – Education Statistical Consultant", DO NOT OPEN EXCEPT IN THE PRESENCE OF TENDER EVALUATION COMMITTEE. The outer envelope must be addressed to:

The Registrar and Chief Executive Officer
Caribbean Examinations Council
The Garrison
St Michael BB14038
Barbados

Proposals must be submitted no later than **18:00 hrs Barbados time, on Saturday, 5 November 2011**. Submissions received after this deadline will not be considered.

2. Evaluation of Proposals

2.1. Evaluation of Technical Proposals

Proposals will be evaluated by the Tender Evaluation Committee on criteria deemed to be in CXC's best interest, including, but not limited to: experience of the bidder with projects of this type, demonstrated ability of bidder to meet specifications; responsiveness to terms and conditions; and cost. It is CXC's intent to award this contract to the bidder who, in its assessment, provides the best fit with this project.

2.2. Evaluation of Financial Proposals

After the technical evaluation is completed, the Financial Proposal of tenderers whose Technical Proposals qualify shall be considered.

2.3. Choice of selected tenderer

The most economically advantageous tender will be established by weighing technical quality against price on an 80/20 basis.

3. Cancellation of the tender procedure

In the event of cancellation of the tender procedure, tenderers will be notified in writing of the cancellation by CXC and informed of the reasons for cancellation. Cancellation may occur where:

- the tender procedure has been unsuccessful, that is, no qualitatively or financially worthwhile tender has been received or there is no response at all;
- the economic or technical data of the project have been fundamentally altered;
- exceptional circumstances or force majeure render normal performance of the contract impossible;
- all technically compliant tenders exceed the financial resources available;
- there have been irregularities in the procedure, in particular where these have prevented fair competition.

In no event shall CXC be liable for any damages whatsoever including, without limitation, damages for loss of profits in any way connected with the cancellation of a tender procedure, even if CXC has been advised of the possibility of damages.

4. Award of Contract

The successful tenderer will be informed in writing of acceptance and a service contract will be issued outlining the Terms and Conditions. The parties are bound by the contract from the moment it is signed.

Once a contract is awarded, the unsuccessful tenderers will be informed that their tenders were not accepted, by means of a standard letter.

5. Confidentiality

Information relating to the evaluation of proposals shall not be disclosed.

6. Conflict of Interest

CXC requires that consultants provide professional, objective, and impartial advice and at all times hold **CXC's** interests paramount, without any consideration for future work, and strictly avoid conflicts with other assignments or their own corporate interests. 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 not being able to carry out the assignment in the best interest of **CXC**.

Without limitation on the generality of the foregoing, Consultants, and any of their affiliates, shall be considered to have a conflict of interest and shall not be recruited, under any of the circumstances set forth below.

6.1. Conflicting assignments

A Consultant (including its Personnel and Sub-Consultants) or any of its affiliates shall not be hired for any assignment that, by its nature, may be in conflict with another assignment of the Consultant to be executed for **CXC**.

6.2. Conflicting relationships

A Consultant (including its Personnel and Sub-Consultants) that has a business or family relationship with a member of **CXC's** staff who is directly or indirectly involved in any part of (i) the preparation of the Terms of Reference of the assignment, (ii) the selection process for such assignment, or (iii) 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 **CXC** throughout the selection process and the execution of the Contract.

Consultants have an obligation to disclose any situation of actual or potential conflict that impacts their capacity to serve the best interests of **CXC**, or that may reasonably be perceived as having this effect. Failure to disclose said situations may lead to the disqualification of the Consultant or termination of contract.

6.3. Unfair Advantage

If a short-listed Consultant could derive a competitive advantage from having previously provided consulting services in any areas related to this current assignment, **CXC** shall make available to all short-listed Consultants together with this RFP, all information that would in that respect give such Consultant any competitive advantage over competing Consultants.

6.4. Fraud and Corruption

CXC requires Consultants to observe the highest standard of ethics during the tendering process and the execution of the contract. As such, **CXC** defines the terms set forth below as follows:

- “corrupt practice” is the offering, giving, receiving, or soliciting, directly or indirectly, of anything of value to influence the action of a **CXC** official in the selection process or in contract execution;

- “fraudulent practice” is any act or omission, including a misrepresentation of facts, that knowingly or recklessly misleads, or attempts to mislead, a **CXC** official in order to influence the selection process, to obtain a financial or other benefit or to avoid an obligation in the selection process or contract execution;
- “collusive practices” is a scheme or arrangement between two or more consultants with or without the knowledge of **CXC**, designed to achieve an improper purpose, including to influence improperly the actions of participants in the tender process by attempting to establish bid prices at artificial, non-competitive levels;
- “coercive practices” means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in a procurement process, or affect the contract execution.

CXC will reject a proposal for award if it is determined that the tenderer recommended for award has, directly or through an agent, engaged in corrupt, fraudulent, collusive or coercive practices in competing for this contract.

Office of the Registrar/CEO
5 October 2011

ANNEX I

TERMS OF REFERENCE

1. Background

The Caribbean Examinations Council (**CXC**[®]) is a special purpose not-for-profit organization established in 1972 by Agreement approved by the Commonwealth Caribbean Regional Secretariat (CARICOM) and given legal status by the Participating Governments who are signatories to the Protocol Agreement. **CXC** has registered offices in Barbados and Jamaica. **CXC** currently serves 16 English-speaking Caribbean countries and three Dutch-speaking countries – Suriname, Saba and St Maarten. The organization works through Ministries of Education and with regional and international partners to carry out its mandate. **CXC** has a suite of internationally-recognized examination products. These are the:

- **Caribbean Advanced Proficiency Examination (CAPE**[®]**);**
- Associate Degrees based on attainment of a prescribed profile in **CAPE**;
- **Caribbean Secondary Education Certificate (CSEC**[®]**);**
- **Caribbean Certificate of Secondary Level Competence (CCSLC**[®]**);**
- **Caribbean Vocational Qualification (CVQ**[®]**)**

CXC holds over 30 years of examinations data commencing from the first **CSEC** examinations in 1979; however, only the last 15 years (from 1995) are stored in a database which is electronically accessible. In 2005, **CXC** implemented a new Examination Processing System (EPS) which afforded access to certain information that is processed and stored; but because the system used between 1979 and 1994 is no longer technically supported electronic data from that period are not readily accessible in the new EPS.

Historically, **CXC** data were processed jointly by **CXC** and the Barbados Government Data Processing Unit (DPU), utilizing the DPU's International Business Machines mainframe and **CXC**'s AS/400 computing systems. An output from this collaboration is approximately 150 volumes of reel tapes containing the data, which are held in storage at **CXC**'s headquarters. The possibility of converting these tapes to a format that can be easily translated to text was explored without resolution in 2003.

Despite having the data therefore, there is an inability to access certain details as a result of the out-dated storage modalities within which some of the data are stored. The lack of availability of a significant proportion of these data has limited **CXC**'s ability to provide much needed historical candidate, subject and country statistical information to its stakeholders. **CXC** is currently unable to provide ready data in a timely manner to its stakeholders because it has to undertake extensive manual interventions – such as physical examination of the broadsheets - to extract the data.

CXC remains the most reliable and comprehensive source of data on candidate performance at the end of secondary education in the Caribbean. However, apart from the difficulties encountered with inaccessible data, there is a paucity of biographical data and very few indices in **CXC**'s EPS to facilitate longitudinal studies across time and levels of

examinations. These challenges inhibit stakeholders from having access to quality and timely data which could enhance educational policy and decision-making across the region. Such data would allow Ministries of Education and other agencies concerned with educational progress and development to identify trends; determine returns from investment in secondary education; make local, territorial, sub-regional or regional comparisons about performance or the efficacy of curricular arrangements; monitor relevant indicators and, where necessary, implement measures to improve educational outcomes.

Such data would also enhance the ability of researchers, especially regional universities which share the remit of developing the region's human capital and providing leadership for the design of high quality indigenous educational products, to provide informed guidance and direction to the region. Access to wide and varied data would also strengthen the capacity of central governments and regional and international agencies such as CDB, the World Bank, USAID and UNESCO, to make informed decisions on policy, planning, budgeting and programme evaluation.

In 2010 CXC submitted a proposal to the Caribbean Development Bank (CDB) for technical assistance to convert its regional performance data into a single accessible format compatible with international databases. However, feedback from CDB and consultations with international and regional agencies, Governments and other stakeholders revealed the critical need for an organization to collect and manage education data for all levels from across the region. This would ensure that the Caribbean is able to meet an agreed Millennium Development Goal expressed in CARICOM's Education for All Plan of Action 2000-2015; namely, establishment of a Caribbean Regional Education Management of Information System that will provide the rigorous analytics required for sound policy and decision-making; and improve reporting on education indicators.

2. Purpose/Objective of the Assignment

The objective of this assignment is to obtain recommendations with costing on appropriate statistical architecture and software to inform implementation of an appropriate education statistical system.

3. Scope of Work

This project will be executed through a consultancy in which the consultant(s) will determine the methodology for completion of this Terms of Reference. The consultant(s) will be required to collaborate closely with CXC's Systems Analysts and other technical staff as required to realize the deliverables. Specifically, the consultant(s) will be required to:

- (a) recommend design concepts, principles, appropriate architecture and software for development of a robust statistical system that will allow for collection and management of regional education data; any such recommendation to encompass:
 - compatibility with UNESCO's Institute for Statistics (UIS) framework and with the International Classification of Education (ISCED) guidelines;
 - ability to mine data from external sources such as national statistical and planning departments from CXC participating countries across the Caribbean;

- decision-software for data visualization and business intelligence;
- (b) determine, with the assistance of **CXC** personnel, method(s) for extraction and inclusion of **CXC**'s historical data into the recommended statistical framework;
 - (c) design indicators/metrics for data mining;
 - (d) identify issues and challenges associated with populating, mining and analyzing of the data, and recommend measures for addressing them;
 - (e) provide full costing breakdown, resource requirements and realistic timelines for implementation of recommendations.

4. End Products

Table 1 shows the required outputs and indicative dates for each output.

Table 1: Schedule of outputs	
Output/Deliverable	Indicative Dates
Revised Methodology for completion of the assignment	One (1) week after the award of the contract
Preliminary report on the extraction and inclusion of CXC 's historical data into the recommended statistical framework	Five (5) weeks after the award of the contract
Preliminary report on assessment of appropriate statistical infrastructure and software to develop the education statistical system	Eleven (11) weeks after the award of the contract
Final report on the full Scope of Works of this TOR	Fifteen (15) weeks after the award of the contract
On-site presentation to Management of final report	Sixteen (16) weeks after the award of the contract

5. Contacts

The principal contact for this Consultancy shall be: Miranda Sealy, Assistant Registrar – Corporate Strategy and Business Development, email: msealy@exc.org, telephone: (246) 227-1746 or (246) 243-9418.

6. Payments

Payments shall be made in accordance with the schedule in Table 2.

Table 2: Schedule of payments	
Payment Driver	Percentage of Payment
Mobilization fee following receipt and acceptance of Methodology	10%
Submission of preliminary report on the extraction and inclusion of CXC's historical data into the recommended statistical framework	30%
Submission of preliminary report on assessment of appropriate statistical infrastructure and software to develop the education statistical system	30%
On-site presentation to Management of final report	30%
<i>All payments will be made approximately 15 working days after receipt of invoice</i>	

7. Requirements of Service Provider

7.1. Qualifications and Skills

The Key Expert is required to have:

- a Master's degree or requisite technical qualification with concentrations in Educational Statistics or Mathematics;
- good knowledge of statistical information systems;
- project planning and/or project management skills;
- extensive research skills;
- knowledge of the regional education environment.

7.2. Specific Experience

The Key Expert is required to provide evidence of creditable performance in the design of educational statistical systems at a national, regional and/or international level within the past five (5) years.

8. Quality and Acceptance Criteria

The final report is expected to include clear and precise, action-oriented recommendations for implementation. The tenderer should follow the specifications outlined in the RFP.

The Registrar/Chief Executive Officer will be responsible for the acceptance of all project deliverables.

Office of the Registrar/CEO
5 October 2011

ANNEX II

SPECIMEN FINANCIAL PROPOSAL

Item	Fee Rate	Duration	Unit Price (US\$)	Total (US\$)
I. FEES				
• Professional Fees				
TOTAL FEES				
II. REIMBURSABLES				
• Travel				
• International travel				
• National travel				
• Per diem				
• Incidentals				
• Other (please specify)				
TOTAL REIMBURSABLES				
GRAND TOTAL				

Note: Only Professional Fees will be used in the assessment of the evaluation of the Financial Proposals.