

# BANTAY ESKUWELA

OPERATIONAL GUIDELINES  
SCHOOL FURNITURE



## Bantay Eskuwela Operational Guidelines

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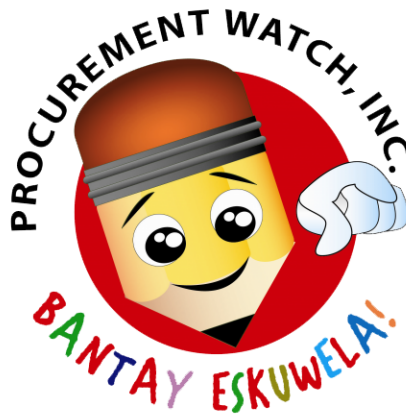
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# BANTAY ESKUWELA OPERATIONAL GUIDELINES



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and the  
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Most of all, PWI recognizes the numerous unnamed volunteers who have devoted their time, energy, and resources to monitor, count, and measure the furniture delivered to their schools -- **Maraming salamat po!**





# Message from the President



Only a year ago, the *Bantay Eskuwela* initiative began to establish its roots across the country in six pilot sites: Bulacan, Davao, Ilocos Norte, NCR, Rizal, and Tagbilaran. Procurement Watch, Inc. (PWI) worked in partnership with various division offices of the Department of Education (Dep-Ed) and local civil society organizations in each area to ensure that quality armchairs are being procured and delivered to over a hundred public schools.

Today, each *Bantay Eskuwela* core group in most pilot sites is now taking the lead in independently continuing this initiative. This not only fostered friendships between members, but also helped achieve transparency and accountability through the efforts of community stakeholders and through the partnership with the Department of Education (DepEd).

The *Bantay Eskuwela* framework may be comprehensive, yet it is simple enough for anyone to be a part of. The simple act of counting the armchairs and inspecting them against DepEd technical specifications have proven to be effective in correcting certain deficiencies in contract implementation.

This manual will serve as a guide on how to do just that in your own community. Through the *Bantay Eskuwela* Operational Guidelines, we hope to equip every stakeholder with a tool for achieving greater procurement efficiency and help avoid wasteful spending of public funds.

A handwritten signature in black ink, appearing to read 'A. F. Astudillo', written over a horizontal line.

**Amador F. Astudillo**  
President, Procurement Watch, Inc.

# Glossary of Terms

**Abstract of Bids/ Abstract of Canvass** – A document that contains the names of the participating bidders and their corresponding bids, as well as the time, date and place of the bid opening.

**Acceptance Report** – A report signed by the end-user signifying the approval of the items delivered.

**Advertisement** – It is also referred as the Invitation to Bid (ITB). It contains relevant information on the project to be bid, including dates of the different bidding stages that interested bidders would have to know in order to be able to participate in the bidding. The ITB should be advertised in a newspaper of general circulation, at the Philippine Government Electronic Procurement System, agency website, and conspicuous places within the agency premises.

**Annual Procurement Plan (APP)** – It is the consolidation of the Project Procurement Management Plan (PPMP). Under the Government Procurement Reform Act (GPRA), no government procurement shall be undertaken unless it is in accordance with the APP.

**Bid Documents** – These are documents used as the basis for bids. It contains all the necessary information for a prospective bidder to prepare a bid for goods, infrastructure projects, and consulting services.

**Civil Society Organization (CSO)** – These include organizations that pursue a social aim that has political aspects, but that are not overtly political organizations.<sup>1</sup>

**Contract** – A copy of the agreement between the procuring entity and the winning bidder, specifying the terms and conditions of the project.

**Delivery Receipt** – A document used to obtain a signature from the consignee when a delivery is made.

**Delivery Schedule** – This is a copy of the schedule of the supplier. This would indicate when the goods would be delivered. This is usually submitted by the bidders as part of their bid documents.

**Disbursement Voucher** – A written statement that bears witness or substantiates a transaction. For example, providing evidence that services have been rendered, goods purchased, or some other expenditure has been made.

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<sup>1</sup> [http://en.wikipedia.org/wiki/Non-governmental\\_organization](http://en.wikipedia.org/wiki/Non-governmental_organization)

**Government Procurement Policy Board (GPPB)** – The principal body responsible for procurement policy formulation and the implementation and monitoring of effective public procurement reform.

**Government Procurement Reform Act (GPRA)** – Also known as Republic Act 9184 signed on January 2003. It is the current procurement law followed for the government biddings. Its Implementing Rules and Regulations (IRR) were revised on September 2009 to include foreign-funded procurement.

**Inspection Report** – A report that contains the results of inspections conducted by the Inspection Team (i.e. whether or not the items delivered are the same as those ordered).

**Invitation to Apply for Eligibility and to Bid (ITB)** – see Advertisement.

**National Government Agency (NGA)** – These are bodies created by the government responsible for the oversight and administration of specific functions.

**Notice to Proceed (NTP)** – This is the document issued by the procuring entity providing the supplier with a signal to start project awarded to them.

**Philippine Government Electronic Procurement System (Phil-GEPS)** – It is the single portal that shall serve as the primary and definitive source of information on all government procurement.

**Purchase Order (PO)** – The contractual agreement with a supplier of goods or services that specifies payment terms, delivery dates, item identification, quantities, freight terms and all other obligations and conditions.

**Purchase Request (PR)** – It is the document submitted when requesting for supplies and materials and the like. It shall be duly signed by authorized official.

## Background

In July 2008, Republic Act 9498, otherwise known as the General Appropriations Act, took effect. It directed the government to allocate one billion pesos to the Department of Education (DepEd) to purchase school furniture for public schools. The intent of the law was to provide each student with an armchair of good quality each year. However, in 2008, the Commission on Audit (COA) released its audit findings that at least P33.8 million worth of “inferior, defective, and substandard quality school tables, chairs, and armchairs” were delivered to the different public schools.<sup>2</sup> This was also a result of the “end-user’s failure to inspect before the items’ delivery.”<sup>3</sup>

Given the amount of wastage and the importance of conducting pre-delivery inspections, community participation is important in ensuring that the right quantity and quality of armchairs are delivered to public schools.

## How could we participate?

All national government agencies (NGAs) are governed by the principles of transparency in the procurement process and in the implementation of procurement contracts.

On 26 January 2003, the Government Procurement Reform Act (GPRA) also known as Republic Act 9184 was enacted. The new procurement law enabled civil society organizations (CSOs) to be involved in observing the conduct of public procurement as procurement observers.<sup>4</sup>

This includes public monitoring of the procurement process and implementation of awarding contracts with the aim of guaranteeing that these contracts are awarded in accordance with law,<sup>5</sup> and its implementing rules and regulations performed strictly in accordance to specifications.<sup>6</sup>

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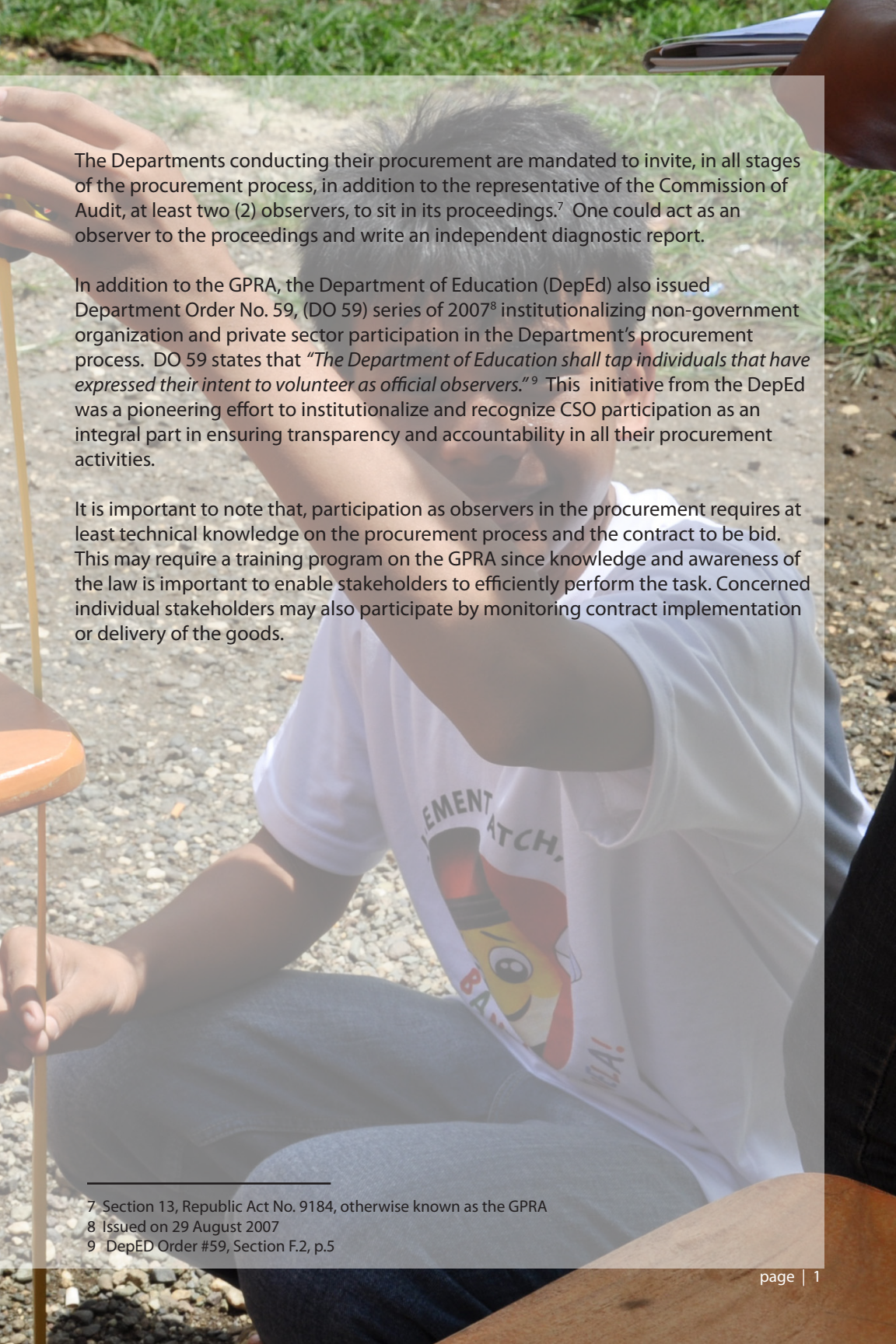
2 COA Report [September 26, 2008]

3 Ibid.

4 Pursuant to Section 13.1 of the GPRA 9184, it states “To enhance the transparency of the process, the BAC shall, in all stages of the procurement process, invite, in addition to the representative of the COA, at least two (2) observers to sit in its proceedings”. Observers are therefore mandated to be part of public procurement all throughout the conduct of public procurement.

5 Republic Act No. 9184, series of 2003

6 Section 3, Republic Act No. 9184, otherwise known as the Government Procurement Reform Act (GPRA)



The Departments conducting their procurement are mandated to invite, in all stages of the procurement process, in addition to the representative of the Commission of Audit, at least two (2) observers, to sit in its proceedings.<sup>7</sup> One could act as an observer to the proceedings and write an independent diagnostic report.

In addition to the GPRA, the Department of Education (DepEd) also issued Department Order No. 59, (DO 59) series of 2007<sup>8</sup> institutionalizing non-government organization and private sector participation in the Department's procurement process. DO 59 states that *"The Department of Education shall tap individuals that have expressed their intent to volunteer as official observers."*<sup>9</sup> This initiative from the DepEd was a pioneering effort to institutionalize and recognize CSO participation as an integral part in ensuring transparency and accountability in all their procurement activities.

It is important to note that, participation as observers in the procurement requires at least technical knowledge on the procurement process and the contract to be bid. This may require a training program on the GPRA since knowledge and awareness of the law is important to enable stakeholders to efficiently perform the task. Concerned individual stakeholders may also participate by monitoring contract implementation or delivery of the goods.

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7 Section 13, Republic Act No. 9184, otherwise known as the GPRA

8 Issued on 29 August 2007

9 DepED Order #59, Section F.2, p.5

# SCHOOL-BASED PROCUREMENT WATCH Project

We are all stakeholders in this society. One may be the student for whose benefit the chairs would be delivered, or the parents of students enrolled in the public schools recipients. One may also be a concerned organization fighting against graft and corruption, or a member of the community where the beneficiary school is located. One may also exercise their rights as taxpayers, and have the use of taxpayer's money.

The school-based procurement watch project is simple, and it follows a few major steps:

1. Once funds allocated for school furniture are available, the DepEd embarks on the procurement process by posting Invitations to Bid through the Philippine Government Electronic Procurement System (Phil-GEPS) or in conspicuous places within their premises.
2. Based on the agreed date, bids submitted by the suppliers or manufacturers will be opened. At this time, volunteers would act as observers to ensure that the agency procurement process is in accordance to the Implementing Rules and Regulations (IRR) of the GPRA.
3. After the Notice to Proceed (NTP) has been issued, volunteers will act as monitors to assist the DepEd Inspectorate Team during the conduct of pre-delivery inspection activities. They will check whether the armchairs are in accordance to the technical specifications required by DepEd, and with the Inspectorate Team, identify model armchairs for delivery purposes.
4. Upon delivery of armchairs, the volunteers would measure the model armchair against the other chairs delivered. They will check if the correct quantity of chairs were delivered on time, and whether these are similar to the model armchair's specifications.

This Operational Guidelines Handbook aims to help organizations or groups of individuals, to participate in the procurement and monitoring of the delivery of the school furniture procured by the DepEd for its public schools.

# 1

## PREPARATORY PHASE

### Getting Organized

Involve the Parent-Teachers Associations (PTA), family, friends, and student organizations by informing them the value of monitoring the delivery of these armchairs and ensuring that they are delivered to the schools. Remember, there is strength in numbers.

### Initiating Contact

The first step is to introduce your group to DepEd by writing a formal Letter of Introduction (see Annex A). The Letter of Introduction should indicate your intent to partner with the DepEd, whether as observers during the bidding phase, or contract implementation monitors during the implementation phase. It is important to leave your contact details with the agency.

After sending the Letter of Introduction, it would be best to consistently follow up with DepEd. Establish a good working relationship with a point person from the agency that you can call and inquire for status.

### Formalize the Partnership

Ideally, everything should be in writing. However, there are cases when the Agency does not want to enter into a formal agreement. This may result to difficulties accessing documents and data needed for observing and monitoring. Thus, it is encouraged that the monitoring group request for a Memorandum of Agreement between your group and the Agency (see Annex B for sample MOA).



## Identify Community Organizers

If your organization is from the community, selection of community organizers would be easier. It should be the Parent-Teachers Association (PTA) school head or chapter head. In case the PTA head is unavailable, the head of any other local civil society organization (CSO) present in the area is advised.

It is important to identify the point person of the local CSOs (herein after referred to as the Community Volunteer Coordinator or “CVC”). Having their contact details is necessary.

## Recruit Volunteers

The more the merrier! It would be best to have as many volunteers as you can. It will not only make more people aware of the effort, it would likewise make the effort itself easier!

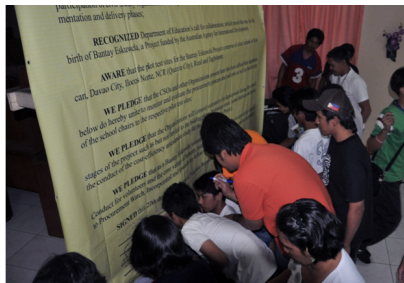
In determining the number of volunteers that would be needed, it would highly depend on the number of chairs that your school have and the number of chairs that the school would be receiving.

## Getting Started

If your organization is based in the community where the schools are located, it would be easier for you to organize a small event. It could be as simple as a meeting or a barangay/town hall gathering.

If your organization is located outside the area where the school is located, then it would be best again to contact the PTA or any other local CSO present in the area. Coordinate with them in order to organize a small gathering.

It is encouraged to invite students enrolled in the school, PTAs, and school organizations as they are the direct stakeholders, if not beneficiaries of the project.





## **During the Event**

The objective of the event is to get more people involved.

Give them a brief orientation on what the project is about, its main objectives, and why they should join you in this undertaking.

After the orientation and briefing, the attendees willing to join and commit to the School-Based Procurement Watch would have to fill-up the Volunteer Information Sheet (VIS) and sign the Pledge of Commitment to be distributed by the CVC.

The VIS contains personal information and contact details of the volunteers (see Annex C).

The Pledge of Commitment is a statement from the volunteer that they will commit in fulfilling the duties and responsibilities attached to the project (see Annex D).

The CVC would be in charge of collecting and keeping the said forms.

## **Beginning Inventory**

At an average, a person can count and classify 320 chairs in a day.

To illustrate, if your school currently has 1000 chairs, and a volunteer could count and classify 320 in a day, then you would need at least four volunteers for the school.

## **Actual Count**

At an average, a person count and inspect 35 chairs per day.

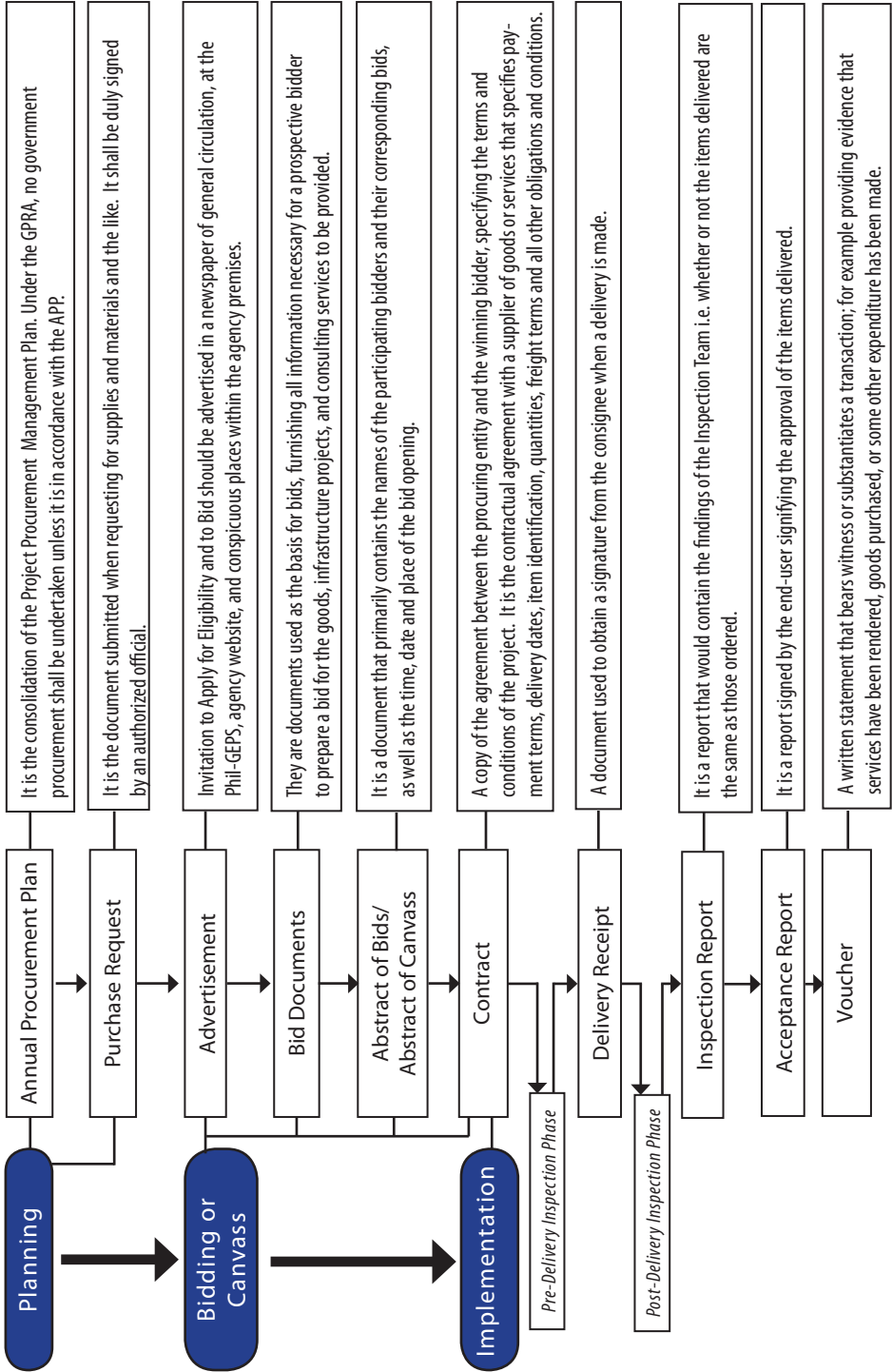
To illustrate, if your school would be receiving 1000 chairs, and a volunteer could count and inspect 35 chairs, then you would be needing at least 29 volunteers.

## **Pre-Delivery and Post-Delivery inspection**

During this stage, it would be enough to have the CVC and another volunteer present.

The stages would be explained further in this guideline.

TABLE 1. Procurement Framework



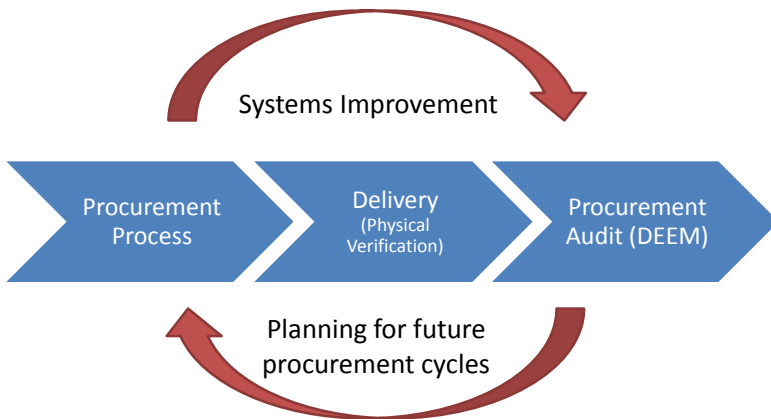
## PWI and the Procurement Process

PWI is involved in three areas of intervention:

1. Procurement process itself,
2. Delivery of the goods and/or services, and
3. Procurement audit.

Non-government organizations can act as observers during the bidding stage to ensure that the procuring entity follows the prescribed procedure mandated by the law. After the contract is awarded, it shall be ensured that what was offered during the bidding stage is actually delivered to the end users. After the payment, PWI uses the DEEM tool to assess whether or not the agency was efficient, both in time and cost, in conducting their procurement. Results of such study will then be used as inputs to the setting of the budget, which precedes the procurement process.

The areas of intervention are best described by using the framework below:



## Legal Basis for Monitoring the Procurement Process

Section 13.1 of the GPRA provides that to enhance the transparency of the procurement process, the Bids and Awards Committee (BAC) shall, in all stages of the procurement process, invite, in addition to the representative of the Commission on Audit, at least two (2) observers to sit in the proceedings; one of which shall come from a non-government organization.

Section 13.2 of the GPRA further provides that the observers shall come from an organization duly registered with the Securities and Exchange Commission (SEC), and should meet the following criteria:

1. Knowledge, experience, or expertise in procurement or in the subject matter of the contract to be bid;
2. Absence of direct or indirect interest in the contract to be bid out; and
3. Any other criteria that may be determined by the BAC

This is likewise strengthened by Department Order No. 59 of the Department of Education.

### **Legal Basis for Monitoring the Delivery**

Section 3.e of the GPRA provides public monitoring of the procurement process and the implementation of awarded contracts as one of the governing principles on government procurement. It has for its end view that these contracts are awarded pursuant to the provisions of the GPRA and that all contracts are performed strictly according to specifications.

### **Legal Basis for DEEM**

For the Bantay Eskuwela Project, one of the documents that is held as basis for the conduct of the DEEM is the Memorandum of Agreement with the Department of Education itself.

The broader and more encompassing basis for audit is the provision of Republic Act No. 6713, otherwise known as the Code of Conduct for Public Officers, which states that in the performance of their duties, all public officials and employees are under the obligation to make the documents accessible to the public. Section 5.e provides that *“All public documents must be made accessible to, and readily available for inspection by the public within reasonable working hours.”*

# 2

## BIDDING PHASE

After organizing your group, and after you have introduced yourselves to DepEd, it is now time for you to step up and participate!

As mentioned in Step One, your organization could act as observers in the Bids and Awards Committee proceedings.

Let us lay down the legal basis for this.

The GPRA provides that to enhance the transparency of the procurement process, the Bids and Awards Committee (BAC) shall, in all stages of the procurement process, invite, in addition to the representative of the Commission on Audit, at least two (2) observers to sit in the proceedings; one of which shall come from a non-government organization.<sup>9</sup> The observers shall come from an organization duly registered with the Securities and Exchange Commission (SEC), and should meet the following criteria:

1. Knowledge, experience, or expertise in procurement or in the subject matter of the contract to be bid;
2. Absence of direct or indirect interest in the contract to be bid out; and
3. Any other criteria that may be determined by the BAC.<sup>10</sup>

Let us simplify. Once you have decided to push through with this undertaking, it would be best that you organization be registered with the SEC, if this has not been done yet. If you are a group of concerned individuals, it would be best to volunteer your services to trained NGOs.<sup>11</sup> Once you have registered, or once you have joined an organization, it is encouraged that you undergo procurement training.

### Invitation to Act as Observers

By this stage, you have already given your initial letter of introduction to the DepEd expressing you intent to act as BAC observers or project monitors. This would now be the time for you to request the BAC to invite your organization to monitor their procurement process. Take note that the procurement law says that the *"BAC shall invite."* Hence, your request would be important to ensure your ticket to monitoring the procurement process.

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<sup>9</sup> Section 13.1. Republic Act No. 9184, otherwise known as the Government Procurement Reform Act

<sup>10</sup> Section 13.2. Republic Act No. 9184, otherwise known as the Government Procurement Reform Act

<sup>11</sup> PWI has trained several NGOs on procurement nationwide. The list could be viewed at the PWI website: [www.procurementwatch.org](http://www.procurementwatch.org)

Of course, there will be no need submit a request if acting as observers during the procurement process is included as part of the Memorandum of Agreement between your organization and DepEd.

**Before the Bidding**

Allocation for the school furniture and who procures them:

DepEd is given an annual budget to be used for the procurement of armchairs for both grade school and high school.<sup>12</sup>

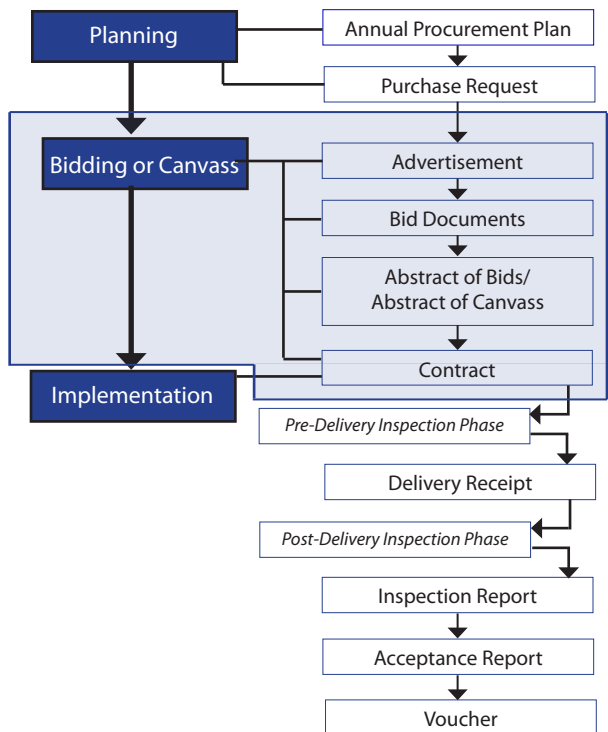
There are three offices within the DepEd that buys the furniture for the schools: the Central Office, the Regional Office, and the Division Offices.

Seventy five percent (75%) of the said budget shall be procured by the Division Offices. Fifteen percent (15%) of the said budget shall be procured by the Regional Offices. The remaining ten percent (10%) shall be procured by the Central Office.<sup>13</sup>

**Overview of the Procurement (Bidding) Process**

Since it is important that the observer should have knowledge on the procurement process, on the right is an overview of the procurement process with a brief description of each stage.

Take note that this covers only the procurement of goods, as school furniture would fall under the said procurement type.



12 The distribution of the appropriation shall be in accordance with Republic Act No. 7880, otherwise known as the "Roxas Law."

13 Department Order No. 26, series of 2008.

**1** *Pre-procurement Conference*

The pre-procurement conference is an internal meeting within the agency to ensure that the procurement is in accordance with the project and annual procurement plan. The GPRA states that no government procurement can be undertaken unless it is in accordance with the Annual Procurement Plan (APP).<sup>14</sup>

**2** *Advertisement of the Invitation to Apply for Eligibility and to Bid*

As mandated by law, the Invitation to Apply for Eligibility and to Bid should be advertised.

**3** *Pre-bid Conference*

The pre-bid conference is the opportunity for the potential bidders to discuss and clarify the technical and financial components of the contract.

**4** *Receipt and Opening of Bids*

This stage is the stage wherein the bidders would be submitting their bids to the BAC of the agencies.

**5** *Bid Evaluation*

During this stage, the Bids and Awards Committee (BAC) shall check the submission of the bidders in terms of mathematical corrections, and thereafter, rank all complying bidders to determine the lowest calculated bid.

**6** *Post-Qualification*

The post-qualification is the stage wherein the BAC verifies, validates and ascertains all the statements and documents submitted by the Lowest Calculated Bid (LCB).<sup>15</sup>

**7** *Award of Contract*

The Contract shall be awarded to the bidder with the Lowest Calculated and Responsive Bid (LCRB).

<sup>14</sup> Section 7.1, Republic Act No. 9184, otherwise known as the Government Procurement Reform Act

<sup>15</sup> Refer to the Public Bidding Checklist for a detailed manner on conducting post-qualification.

The enumeration is merely an overview. It is encouraged that the organization undergoes procurement training. Refresher courses are likewise highly encouraged.

### **\*Support for Philippine Basic Education Program**

Some of the schools may be beneficiaries of the Support for Philippine Basic Education Program (SPHERE). SPHERE is a trust fund from the Australian Agency for International Development (AusAID) which is managed by the World Bank.

Since the funds are managed by the World Bank, then the procurement guidelines of the World Bank should be followed.

### **During the Bidding:**

After you have equipped yourselves with enough technical knowledge on the procurement law, it is now time to apply them.

Tools that you would need:

- A copy of the GPRA,
- Public bidding checklist for goods, and
- Code of Conduct for BAC observers and monitors<sup>16</sup> (see Annex E).

You will get important information during the bidding stage such as the technical specifications of the armchairs and the dates of delivery. As an observer, you may also request for a copy of the bidding documents so you can familiarize yourself with the project requirements and even technical specifications. This is also where good working relationship with the Department comes very important.

The bidding documents contain the specifications of armchairs and the number of chairs to be delivered. It is important to have this document as basis for the conduct of your monitoring activity.

Aside from the bidding documents, you may also get a copy of the following documents:

1. Minutes of related proceedings of BAC meetings,
2. Abstract of Bids,
3. Post-qualification summary report,
4. APP and related Project Procurement Management Plan (PPMP), and
5. Copies of "opened" proposals.<sup>17</sup>

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<sup>16</sup> The Code for Ethics for BAC Observers and Monitors consists of the standards and principles that each BAC Observer and Monitor should adhere to. This is included in the Updated Public Bidding Checklist for Goods made especially for this project.

<sup>17</sup> Section 13.4, Republic Act No. 9184 Implementing Rules and Regulations, otherwise known as the GPRA  
page | 12



Further, it is equally important to request for a copy of the contract after the winning bidder has been determined and contract has been awarded. The contract would indicate when the delivery would be made, as well as information specified in the bidding documents. It is also best to have a copy of the Notice to Proceed as well as the copy of the delivery schedule.

### **After the Bidding:**

#### *Reporting Requirements*

Should there be any observation regarding the process involved, you should report them to the procuring entity (in this case DepEd) by writing a diagnostic report (see Annex F). The observer would have to write his/her observations during the conduct of the bidding process.

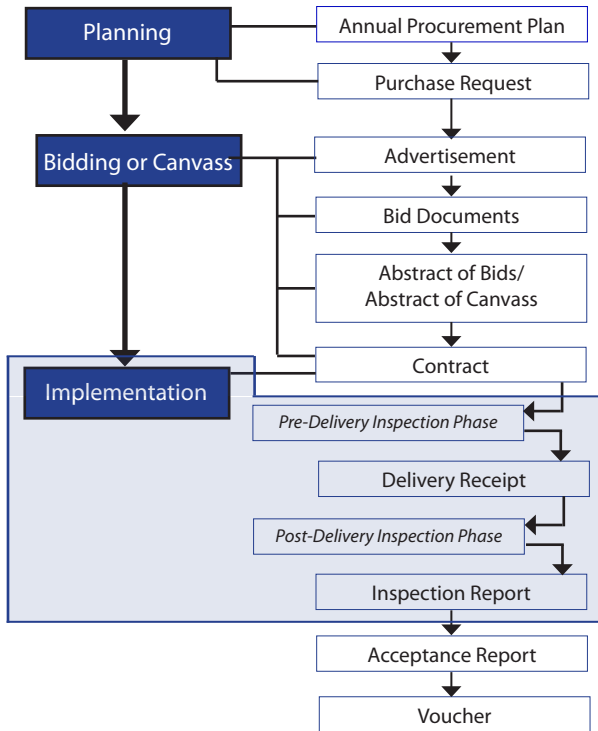
Should there be any discrepancies from the procurement process, the role of the observer is to submit a diagnostic report to the Head of the Procuring Entity (HOPE) copy furnished the Chairman of the BAC. The observer is encouraged to submit a copy of his/her report to the Office of the Ombudsman .

The drafting and submission of the diagnostic report by the volunteers is important because it assesses the compliance of the BAC with the provisions of the law and areas for improvement in BAC proceedings.



# 3

## MONITORING PHASE



By this time, these are the things that you should have already accomplished:

1. A team composed of several volunteer-stakeholders;
2. Secured a copy of the signed MOA;
3. Obtained a copy of the specifications of the armchairs to be delivered; and
4. Information on hand as to the date of the delivery of the chairs at the school you wish to monitor as indicated in the Delivery Schedule.

Here are some of the tools you need:

1. Copy of the Operational Guidelines Handbook;
2. Measuring tape to measure technical specifications of the armchairs;
3. Camera and/or video camera to document the monitoring process;
4. Reporting Templates to help you know what to look out for during furniture delivery;
5. Reference guide containing a list of bulleted items that would remind you of what to do during each stage of the process; and

6. Notebook and pen to write down notes and other information you have gathered during the activity. When all fails, your notes would be a reliable source of information.

Having the team ready, information on hand, and tools in place, you are now ready to conduct the beginning inventory.

## Beginning Inventory

The beginning inventory is the stage wherein the team of volunteers would count the number of existing chairs inside the classrooms. This phase is very important as this will be the benchmark for future *Bantay Eskuwela* activities and recommendations.

In filling out the forms, the procedure would be as follows:

### *Before entering the classroom*

1. Secure enough Beginning Inventory forms (see Annex G). To know how many you would need, it is advised that you ask a copy of the building plan of the school from the property custodian. This will tell you how many classrooms the school has.
2. One Beginning Inventory Count Form is good for one classroom.
3. Make sure that information on the form is complete. *Do not forget to place the room number of the classroom, floor number, as well as the building where the room is located.* This would be useful information should any revalidation be made.
4. The counting of the armchairs would be done per classroom.

### *Upon entering the classroom*

1. The team/ volunteer should classify the armchairs according to use, whether the chair is "**USEABLE**" OR "**NON-USEABLE**."
2. **USABLE** means that it could either be "**GOOD**" or "**NEEDS MINOR REPAIR**."



3. **GOOD** would still include chairs that are merely discolored, those with minor rusting or with graffiti. These are armchairs that are in their original form, and will be good to last for another school year.
4. **NEEDS MINOR REPAIR** means are those armchairs that have loose screws and/or lack one seat slot, or back rest slot, and/or chipped, incomplete book shelf slot, or cracked writing tablets. Should there be other findings and observations, please put it under the remarks column at the beginning inventory form.
5. **NON USABLE** means that the armchair is due for replacement. This could mean that the armchair has missing parts (if the chair has no back rest, no arm rest, no seat). It could also mean that the armchair has undergone multiple repairs, resulting to a weak foundation that renders the chair unsteady or just by simply looking at it, the armchair is no longer in a useable state.
6. After classifying the armchairs according to use, then the next thing to do is to classify them according to the materials used, whether the chair is made from **"ALL WOOD, WOOD AND STEEL, NON-WOOD (PVC AND STEEL), or "OTHERS."**
7. **"ALL WOOD"** armchairs are those where aside from the nails and screws, the chair is made entirely out of wood.
8. **"WOOD AND STEEL"** armchairs are those armchairs whose frames are made out of steel, while the seat, back and shelf slots are made of wood.
9. **"NON-WOOD (PVC AND STEEL)"** armchairs are those armchairs whose frames are made of steel but the seat and back rest are made of a certain plastic known as Polyvinyl Chloride (PVC).
10. Should the armchair you see inside the classroom does not fall under any of the three, then you classify them under **"OTHERS."**
11. There are instances where the classroom you enter into does not have armchairs. This will be true especially for some elementary schools as they use desks or table and chair combo instead of armchairs. You also place these furniture under **"OTHERS."**
12. The remarks column is the space wherein the volunteer could put his/her observation on the chair e.g. the chair lacks one leg, or the leg is broken, etc.
13. Tally all the chairs that are usable as well as those that are non-usable.
14. Make sure that the number of usable chairs and the number of non-usable chairs correspond to the total number of chairs inside the classroom.

### Before leaving the school premises

1. Count the number of beginning inventory forms that you have. Remember if you have twenty classrooms in the school, at the end of the exercise, the team should have twenty forms, one per classroom.
2. The CVC or the project head should check the submitted Beginning Inventory Count Form of the volunteers. Should there be some discrepancies, or questions as to the remarks given by the volunteer, it would be advisable to go back to the said classroom, and verify the data provided.

### Pre-Delivery Inspection Stage

The pre-delivery inspection stage is the point wherein the volunteers would have to personally go to the manufacturer's plant to check the technical specifications and quality of the armchairs that they manufacture, even before delivery.

The team would have to be with the DepEd Inspectorate Team (Central, Regional, or Division Inspectorate Team). See Annex H for an overview of the creation, roles and responsibilities of the Inspectorate Team.

In conducting the pre-delivery inspection, the volunteers may be guided by the Pre-Delivery Inspection Form (see Annex I).





The job of the DepEd Inspectorate Team is to ensure that the specifications of the DepEd are followed by the manufacturer. The volunteers would be there to assist the DepEd Inspectorate Team.

After ensuring that the chairs were manufactured according to the specifications of the agency, the DepEd Inspectorate Team would place a sticker on the chairs that passed the inspection. The number of chairs that would have the sticker should AT LEAST be equal to the number of recipient schools on the contract documents. For example, if the supplier would deliver to 10 schools, then at least 10 armchairs would have the DepEd stickers. Those chairs would be the model armchairs and will be delivered together with the rest of the armchairs allotted for the school.



The model armchairs will serve as the school's basis for evaluation of the delivery.

### **Delivery Stage**

At this stage, the volunteers should be equipped with copies of the following:



1. Contract/purchase order,
2. Technical specifications (to know the measurement, type and quantity of chairs to be delivered),
3. Schedule of delivery,
4. Schedule of requirements (this contains the list of recipient schools and the quantity of chairs to be delivered),
5. Measuring tape,
6. Camera/video tape,
7. Actual delivery report form (See Annex J), and
8. Notebook and pen



It is important that the team is certain of the delivery time and date of the chairs so as not to waste time and effort of the volunteers. It is encouraged that the team be present at the school premises before the supplier arrives.

It is during this point that the volunteers ensure that the school gets the number of chairs that are allotted to them. If the contract or bidding document states that the school should get 500 armchairs, then the school should get 500 chairs. No more, no less.

Remember that during the pre-delivery inspection stage, stickers were placed at the chairs that passed the technical specifications. During the delivery, the model armchair/s would be compared to the newly delivered chairs. The comparison would be made by the School Inspection Committee. In short, the chairs with stickers would be compared against the chairs delivered.

The actual delivery report forms consist of two parts: the delivery details and the technical specifications of the chairs.

The delivery details consist of the basic information on the school where the chairs would be delivered, supplier, and type of delivery (complete or partial).

In filling out the actual delivery report forms, the procedure would be as follows:

#### *For delivery details*

1. Fill out the information on the school site and the supplier.
2. Fill out the information on delivery.
3. The “total number of chairs for delivery” refers to the number of chairs that the school should receive. This can be obtained from the schedule of requirements.
4. Please check whether the delivery is complete or partial.

#### *For technical specifications*

1. The actual delivery form will also contain a table that would check the technical specification and dimensions of the chairs. The volunteers would have to check the dimensions/measurement each chair that would be delivered. Classify whether the chair is made of all-wood, combination of wood and steel, and non-wood based i.e. all steel, plastic and steel, or others.
2. The volunteer should write on the remarks portion whether or not the chair delivered meets the minimum allowable measurements.



3. “Minimum allowable measurements” means the measurements as indicated in the bidding documents. However, there are tolerances allowed by the DepEd Inspectorate Team. Please see the Actual Count forms as the tolerances are indicated there.
4. If the chair does not meet the minimum allowable measurements as provided in the bidding documents, indicate in the remarks column.
5. Apparent defects in workmanship may likewise be placed in the remarks column. These defects could include lack of required varnish, nails sticking out of the chairs, loose screws, among others.
6. Feel free to put your other observations on the “Remarks” column.
7. The CVC should consolidate all the reports of the volunteers.

## Ending Count

As a final activity during the delivery phase, the volunteers would count the total number of chairs to include the existing chairs and the newly delivered ones. The volunteers will use the Ending Inventory Count forms similar to the Beginning Inventory Forms (see Annex K).

As a rule, just like the beginning inventory forms, the number of forms should be equal to the number of classrooms in the school. However, should there be armchairs located outside of the classroom (i.e. corridors), then fill out a separate form for it.

## Post-Delivery Inspection

During post delivery inspection, the DepEd Inspectorate Team goes to the schools and validates the reports made during the delivery. So, if the School Inspection Committee made the inspection during the delivery, then the DepEd Inspectorate Team of the Central Office would check the reports made by the former.

During this stage, it is best that the CVC be present together with other volunteers.





# 4

## DEEM PHASE

### Background

Surveys are oftentimes conducted by asking by people about their opinion on certain issues. Corruption is one of them.

Oftentimes, the question is “What do you think is the most corrupt agency?” It may also be phrased in any other way. But if you analyze it, the question only asks the perception of the respondent.

The Differential Expenditure and Efficiency Measurement (DEEM) Tool aims to address issues on “perception.” In simple terms, it seeks to measure the efficiency or inefficiency of an agency through verifiable data.

If the concept of the DEEM would be applied to school furniture, the story would go something like this: An agency bought 10 armchairs for P100 each. However, if you look at the market cost of the same chair, you may find out that the same chair could be bought at only P50 per chair. Therefore, the agency could have saved at least fifty percent of the fund, had they conducted their procurement more efficiently.

As to time periods, efficiency could also be measured by getting the difference between the actual time it took the agency to get their jobs done and how much time are they actually allowed by the current and governing rules and regulations to get the job done.

So if it took the agency six months from the opening of bids until the award of the contract, we subtract this from the three months which the GPRA provides. If the contract states that the delivery should be made 120 days after the award of the contract, one could check whether the supplier actually deliver on time.

### What to do before conducting the DEEM phase

From the very beginning, it was stressed that partnership would be an important tool for this project. If the MOA worked for your request to be an observer in the procurement stage, then at this point, working relationship between the volunteer and DepEd has been established.

## **Documents that you need in conducting the DEEM Phase**

Before you could measure the efficiency or inefficiency of an agency, copies of the following documents have to be secured:

1. Copy of the approved contract,
2. Purchase Request and Purchase Order,
3. Sales Invoice,
4. Disbursement Vouchers,
5. Delivery Receipt,
6. Inspection Report,
7. Inspection and Acceptance Report, and
8. Abstract of Bids/Canvass.



**Differential Expenditure and Efficiency  
Measurement (DEEM) Forms**

**STEP 4**

# DISBURSEMENT VOUCHER DEEM FORM

DEEM TOOL PROJECT SAMPLE REPORTING FORM																			
CHECK IDENTIFICATION	VOUCHER IDENTIFICATION																		
C1 CHECK NUMBER _____	V1 DISBURSEMENT VOUCHER NUMBER _____																		
C2 CHECK DATE _____ / _____ / _____ (MM/DD/YYYY)	V2 DISBURSEMENT VOUCHER DATE _____ / _____ / _____ (MM/DD/YYYY)																		
CHECK DATA	OTHER VOUCHER DATA																		
C3 PAYMENT DATE _____ / _____ / _____ (MM/DD/YYYY)	V3 DISBURSEMENT VOUCHER PARTICULARS: _____ _____ _____																		
C4 GROSS AMOUNT _____																			
C5 TAX _____																			
C6 PENALTY _____	V4 TYPE OF PROCUREMENT _____																		
C7 PRICE DIFFERENTIAL _____	V5 COMPLETE SIGNATURES? (Encircle choice.) 1 Yes      2 No																		
C8 LIQUIDATED DAMAGES _____																			
C8 CHECK AMOUNT _____	V5N If No, fill up the following table for missing signatures:																		
C9 NAME OF PAYEE _____	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%;">Certification (1)</th> <th style="width: 33%;">Name (2)</th> <th style="width: 33%;">Position (3)</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>	Certification (1)	Name (2)	Position (3)															
Certification (1)	Name (2)	Position (3)																	
C10 ADDRESS OF PAYEE _____																			
COUNT OF FORMS	REMARKS/OBSERVATIONS																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">FORMS</th> <th style="width: 50%;">CHECK if forms are attached to the voucher</th> </tr> </thead> <tbody> <tr><td>F1 PURCHASE REQUESTS</td><td> </td></tr> <tr><td>F2 PURCHASE ORDERS</td><td> </td></tr> <tr><td>F3 INVOICES</td><td> </td></tr> <tr><td>F4 INSPECTION REPORTS</td><td> </td></tr> <tr><td>F5 INSPECTION AND ACCEPTANCE REPORT</td><td> </td></tr> <tr><td>F6 ABSTRACTS OF CANVASS</td><td> </td></tr> <tr><td>F7 ABSTRACT OF BIDS</td><td> </td></tr> <tr><td>F8 OTHERS</td><td> </td></tr> </tbody> </table>	FORMS	CHECK if forms are attached to the voucher	F1 PURCHASE REQUESTS		F2 PURCHASE ORDERS		F3 INVOICES		F4 INSPECTION REPORTS		F5 INSPECTION AND ACCEPTANCE REPORT		F6 ABSTRACTS OF CANVASS		F7 ABSTRACT OF BIDS		F8 OTHERS		
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F5 INSPECTION AND ACCEPTANCE REPORT																			
F6 ABSTRACTS OF CANVASS																			
F7 ABSTRACT OF BIDS																			
F8 OTHERS																			

# Sample Disbursement Voucher

		DISBURSEMENT VOUCHER		No.
<b>V1: Disbursement Voucher Number</b>	Mode of Payment	<input type="checkbox"/> MDS Check	<input type="checkbox"/> Commercial Check	<input type="checkbox"/> ADA
		<input type="checkbox"/> Others		
<b>C9: Name of Payee</b>	Payee	TIN/Employee No.	OR/BUR No.	
<b>C10: Address of Payee</b>	Address	Office/Unit/Project	Responsibility Center Code	
	EXPLANATION		AMOUNT	
<b>V3: Disbursement Voucher Particulars</b>	Payment for 100% accomplishment of supply and delivery of school furniture manufactured by Ronwood Construction & Supply under the School Furniture Program (10% CY 2006 National Reserve Fund).		Php - 1,096,971.43	
<b>C4: Gross Amount</b>	Computation: Contract Gross Amount → 1,296,000.00 Less: Gross Amt. → 1,186,999 (1,296,000 x 90%) Withholding Tax = 44,571.43 Value Added Tax = 57,857.14 Retention Fee = 129,600.00 TOTAL → 189,028.67			
<b>C5: Taxes</b>	Net Amount: 1,096,971.43			
<b>C8: Check Amount</b>	1,103,914.29		1,103,914.29	
	Payment thru ADA		Php - 1,096,971.43	
	<input type="checkbox"/> Cash available <input type="checkbox"/> Subject to Authority to Debit Account (when applicable) <input type="checkbox"/> Supporting documents complete		<input checked="" type="checkbox"/> Approved for Payment One million one hundred three thousand nine hundred fourteen pesos and 00/100 only.	
	Signature	Signature		
	Printed Name	Printed Name		
	Position	Position		
	Date	Date		
<b>C1: Check Number</b>	C Received Payment		JEV No.	
<b>C2: Check Date</b>	Check/ADA No.	Date	Bank Name	
	Signature	Date	Printed Name	Date
	Official Receipt/Other Documents			

STEP 4

## How to Fill Out the Disbursement Voucher Form:

1. Refer to the DEEM form on the left. Look for the coded numbers (e.g. C1, V1, etc.) on the sample disbursement voucher above. Use these as a guide to fill out the DEEM Disbursement Voucher form.
2. *Gross Amount* refers to the amount before all possible deductions are applied. Possible deductions may be in the form of tax, penalty, or price differential.
3. *Check amount* refers to the Gross Amount minus all the deductions.
4. *Name of Payee* refers to the claimant or Supplier. This is usually the company being paid.
5. For the count of forms, place a check if the documents required to be attached are indeed attached to the voucher.
6. For item F8 (Others) on the DEEM form, simply place what other attachments are there to the vouchers, aside from the enumerated documents.

## PURCHASE REQUEST DEEM FORM

DEEM TOOL PROJECT PURCHASE REQUEST INFORMATION FORM		
REQUEST IDENTIFICATION	DETAILS ON REQUESTED ITEM	
R1 PURCHASE REQUEST NUMBER _____	R10 DESCRIPTION OF REQUESTED ITEM: _____ _____ _____ _____	
R2 PURCHASE REQUEST DATE ____/____/____ (MM/DD/YYYY)		
DETAILS ON REQUESTED SOURCE		
R3 REQUESTING DEPARTMENT _____		R11 QUANTITY _____
R4 REQUESTING SECTION _____	R12 UNIT _____	
R5 NAME OF REQUESTING PERSON _____ _____	R13 ESTIMATED UNIT COST _____	
R6 POSITION OF REQUESTING PERSON _____ _____	R14 ESTIMATED COST _____	
R7 DATE OF REQUEST ____/____/____ (MM/DD/YYYY)	R15 PURPOSE _____ _____ _____	
OTHER REQUEST DATA	REMARKS/OBSERVATIONS	
R8 COMPLETE SIGNATURES? (Encircle choice.)  1 Yes      2 No		
R9 FOR RECURRING ITEM: WITH ACCOMPANYING STOCK POSITION REPORT?  1 Yes      2 No		

### How to Fill Out the Purchase Request Form:

1. Refer to the DEEM form above. Look for the coded numbers (e.g. R1, R2, etc.) on the sample purchase request form on the right. Use these as a guide to fill out the DEEM Project Purchase Information form.
2. *Date of Request* (item R7) is usually placed under the signature of the requesting person, should there be none indicated, place NONE.
3. In order to answer item R9, look at the purpose.
4. In answering item R10, see what is indicated in the Purchase Request.
5. *Estimated Cost* (item R14) refers to Estimated Unit Cost multiplied by the Quantity.

# Sample Purchase Request Form

Department of Education  
 Region II  
 DIVISION OF BUDGET  
 City of Madison

PURCHASE REQUEST

**R2: Purchase Date** → \_\_\_\_\_ Date: 1-09  
**R1: Purchase Number** → \_\_\_\_\_ Date: \_\_\_\_\_  
**R3: Requesting Department** → Department: of Education  
**R4: Requesting Section** → Section: Business Facilities  
**R10: Item Description** →

Stock No.	Unit of Issue	Item Description	Quantity	Estimated Unit Cost	Estimated Total
1.	nos.	Landscape (all work)	9,900	2,700.00	26,820,000.00
2.	nos.	Teachers Table & Chair	255	4,600.00	1,173,000.00
3.	nos.	Administrative Table & Chairs	75	2,000.00	150,000.00
TO Monitoring Fund					28,093,000.00
					29,107,400.00

**PRE - AUDITED**  
 PURSUANT TO COA CIRCULAR NO. 2009-1002  
 MARIA ROSARIO G. SATED  
 STATE AUDITOR  
 AUDITOR: \_\_\_\_\_  
 DATE: \_\_\_\_\_

**R15: Purpose** → Purpose: for use in the Monitoring of elementary schoolwork teachers in the division.  
**R5: Name of Requesting Person** → Requested by: \_\_\_\_\_  
**R6: Position of Requesting Person** → Designation: \_\_\_\_\_

STEP 4

**CONTRACT DEEM FORM**

DEEM TOOL PROJECT CONTRACT INFORMATION FORM								
CONTRACT DETAILS	DETAILS ON ORDERED ITEM							
C1 CONTRACT NUMBER _____	C7 QUANTITY _____							
C2 CONTRACT DATE ____/____/____ (MM/DD/YYYY)	C8 UNIT _____							
C3 PROJECT NAME _____	C9 UNIT COST _____							
C4 NAME OF SUPPLIER _____	C10 AMOUNT _____							
C5 IS THE NAME OF THE SUPPLIER INDICATED IN THE DISBURSEMENT VOUCHER? (Encircle choice.)  1 Yes      2 No	<b>REMARKS/OBSERVATIONS</b>							
C5N IF NO, INDICATE THE NAME OF THE SUPPLIER WRITTEN IN THE CONTRACT _____								
C6 COMPLETE SIGNATURES? (Encircle choice.)  1 Yes      2 No								
C6N If No, fill up the following table for missing signatures:								
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; padding: 5px;">Name of Signatory</th> <th style="width: 50%; padding: 5px;">Position</th> </tr> </thead> <tbody> <tr><td style="height: 15px;"> </td><td> </td></tr> <tr><td style="height: 15px;"> </td><td> </td></tr> <tr><td style="height: 15px;"> </td><td> </td></tr> </tbody> </table>	Name of Signatory	Position						
Name of Signatory	Position							

**How to Fill Out the Project Contract Information Form:**

1. Refer to the DEEM form above. Look for the coded numbers (e.g. C1, C2, etc.) on the sample purchase request form on the right. Use these as a guide to fill out the DEEM Project Contract Information form.



# Sample Contract

REPUBLICA NG PILIPINAS  
 REPUBLIC OF THE PHILIPPINES  
**KAGAWARAN NG EDUKASYON**  
**DEPARTMENT OF EDUCATION**  
 DepEd Complex, Meralco Ave., Pasig City, Philippines  
 Website: <http://www.deped.gov.ph>  
 Direct Line: 636-65-43 / Telefax: 636-65-42; 633-9343      Trunk Line: 632-13-61 Local: 20852115

**DepED**  
DEPARTMENT OF EDUCATION

**C3: Project Name** ← PROJECT : Supply and Delivery of Elementary and Secondary Armchairs to various Public Schools Nationwide under the CY 2007 10% Unallocated Portion of the DepEd Desk/Armchair Project

**C1: Contract Number** ← CONTRACT NO : PFSED-BII-2008-11-012D

**PURCHASER-SUPPLIER CONTRACT**

**C2: Contract Date** ← THIS CONTRACT made and entered into on the \_\_\_\_ day of \_\_\_\_\_, 200\_\_ by and between the Department of Education, located at the Department of Education Complex, Meralco Avenue, Pasig City, Philippines, represented herein by its Department Secretary, **JESLI A. LAPUS**, hereinafter referred to as the "Purchaser" and \_\_\_\_\_, and **J. M. Babat Enterprises**, represented herein by its Proprietor/Owner, \_\_\_\_\_ at Daitan, Mati, Davao Oriental, Philippines, hereinafter \_\_\_\_\_ part;

**C4: Name of Supplier** ← \_\_\_\_\_

**C7: Quantity** ← WHEREAS the Purchaser invited bids for certain goods and ancillary services stated in above Project, and has accepted bid(s) from the Supplier, for the supply and delivery of those goods and ancillary services, in the sum of PHILIPPINE PESOS EIGHT MILLION SIX HUNDRED FIFTY EIGHT THOUSAND SIX HUNDRED NINETY FIVE AND 00/100 (P8,658,695.00) ONLY, hereinafter referred to as the "Contract Price" with the following details:

**C91: Unit Cost** ←

Package A Lot No.	Region	Armchair	Unit Price in PhP	Quantity in Pieces	Contract Amount in PhP
5	XI	Wood & Steel	Php989.00	5,109	Php5,062,801.00
6	XII	Wood & Steel	Php688.00	3,646	Php3,606,894.00
Total				8,755	Php8,658,695.00

**C10: Contract Amount** ←

NOW THIS CONTRACT WITNESSETH AS FOLLOWS:

- Whereas, in this Contract words and expressions shall have the same meanings as are respectively assigned to them in the General Conditions of Contract;
- Whereas, the following documents shall be deemed to form and be read and construed as part of this Contract:
  - Purchaser's Notice of Award
  - Performance Security
  - Bid Form and Price Schedule submitted by Supplier
  - General and Special Conditions of the Contract
  - Technical Specifications and the Schedule of Requirements
  - Approved Resolution to Award
  - Credit Line of Supplier issued by a licensed bank, if any

DEPARTMENT OF EDUCATION  
 RECORDS SECTION  
**RELEASED**  
 0974  
 2008

**STEP 4**

*NOTE: Sometimes, the agency may use a Purchase Order instead of a contract. In such a case, use the next form.*

Sample Contract

SUPPLIER'S WITNESS

3. Whereas, in consideration of the Contract Price mentioned herein to be paid by the Purchaser to the Supplier, the Supplier hereby covenants with the Purchaser to provide the goods and ancillary services and to remedy defects therein in conformity in all respect with the provisions of the Contract;

4. Whereas, the Purchaser hereby covenants to pay the Supplier in consideration of the provision of the goods and ancillary services and the remedying of defects therein, the Contract Price or other sum as may become payable under the provisions of the Contract at the times and in the manner prescribed by the Contract;

5. Whereas, the Contract Price shall be paid to the Supplier through the Government current disbursement procedure as follows:

LOUIS N. KABATA  
SUPPLIER

5.1. **1<sup>st</sup> Payment:** 25% of the Contract Price per lot shall be paid to the Supplier upon 25% delivery of the requirement per lot and duly accepted by the schools' representatives. Payment shall be made within 60 days from date of acceptance of the Goods at Project Sites and submission of complete documents;

5.2. **2<sup>nd</sup> Payment:** 25% of the Contract Price per lot shall be paid to the Supplier upon 50% delivery of the requirement per lot and duly accepted by the schools' representatives. Payment shall be made within 60 days from date of acceptance of the Goods at Project Sites and submission of complete documents;

5.3. **3<sup>rd</sup> Payment:** 25% of the Contract Price per lot shall be paid to the Supplier upon 75% delivery of the requirement per lot and duly accepted by the schools' representatives. Payment shall be made within 60 days from date of acceptance of the Goods at Project Sites and submission of complete documents;

PURCHASER'S WITNESS

5.4. **Final Payment:** 25% of the Contract Price per lot shall be paid to the Supplier upon complete delivery of the requirement per lot and duly accepted by the schools' representatives. Payment shall be made within 60 days from date of acceptance of the Goods at Project Sites and submission of complete documents; or

5.5. **One Time Payment on Complete Delivery and Final Acceptance:** One hundred percent (100%) of the Contract Price per lot shall be paid to the Supplier within 60 days after delivery and acceptance of 100% of the Goods per lot at Project Sites and upon submission of complete documents;

PURCHASER

5.6. Payments shall be subject to the "Warranty" provision either in the form of Retention Money equal to at least 10% of every progress payment, or a special Bank Guarantee in the amount equal to at least 10% of the Contract Price per lot required in Section 62 of R.A. 9184 and it IRR-A.

DEPARTMENT OF EDUCATION  
RECORDS DIVISION  
**RELEASED**  
0975  
JAN 16 2009

IN WITNESS WHEREOF, the parties hereto have caused this Contract to be executed in accordance with their respective laws on the day and year first above written.

SIGNED, SEALED AND DELIVERED BY:  
DEPARTMENT OF EDUCATION  
RECORDS DIVISION  
0976  
PURCHASER SUPPLIER

SIGNED IN THE PRESENCE OF:  
Purchaser's Witness Supplier's Witness

REPUBLIC OF THE PHILIPPINES ) S.S. ( )  
PASIG CITY, METRO MANILA )

**ACKNOWLEDGMENT**

BEFORE ME, a Notary Public in and for Pasig City, Metro Manila, Philippines, this 22<sup>nd</sup> day of January, 2008 personally appeared:

NAME	RESIDENCE CERTIFICATE NUMBER	ISSUED ON	ISSUED AT
[Redacted]	04637477	Jan 7, 2008	Concepcion, Tarlac
[Redacted]	015 T1006	Jan. 9, 2008	Marikina, Cavite

Known to me and to me known to be the same persons who executed the foregoing instrument and acknowledged to me that the same is the free and voluntary act and deed of the entities which they respectively represent.

The foregoing instrument is a PURCHASER-SUPPLIER CONTRACT consisting of three (3) pages (exclusive of attachments), including this page on which this acknowledgment is written and signed by the parties hereto and their instrument witnesses on each and every page hereof.

WITNESS MY HAND AND SEAL on the date place first above written.

Doc. No. 303  
Page No. 66  
Book No. 12  
Series of 2008

PTX ME JHANE ROSALES CAL. CITY  
JBT NO. 20781, SLATED, BALICORON CITY  
COMMISSION EXPIRES DEC. 31, 2008  
ROLL NO. 4003, ISSUE NO. 01001010

NOTARY PUBLIC  
Until December 31, 2008

STEP 4







# Sample Invoice

**AVESCO MARKETING CORPORATION**  
 INVENTORS • IMPORTERS • WHOLESALE • RETAILERS  
 ELECTRICAL & ELECTRONICS SUPPLIES EQUIPMENT & APPLIANCES  
 UNIT REG. TIN 000-400-100-000  
 P.O. BOX 3024 MANILA TEL: 80-88-81 02 LINES FAX NO: 80-22-02 912-29-89  
 AVESCO FRISCO TEL: 372-35-84 TO 88 • AVESCO MANILA TEL: 733-81-61 TO 88

**ORIGINAL**  
 Invoice No. 2009-15  
 Date 04/27/2009

**CHARGE INVOICE**

Sold To: DEPT. OF EDUCATION CENTRAL OFFICES.  
 Address: REGION III  
 Deliver To:

**D3: Payment Terms** →

Code: C599    Year Reference: 20078297    S.O./S.R. No.: 20078297    O.R. No.:    B/I No.:    B/I Date:    Terms: 30 DAYS    Settlement: E35

CODE	PRODUCT DESCRIPTION	QTY	U/M	UNIT PRICE	NET PRICE	AMOUNT
ST5010137	ELEMENTARY & SECONDARY ARMOIR (WOOD & STEEL)	1,350.00	pc.	600.00 Priced at Sales (Standard)	810.00	915,000.00
<b>INVOICE TOTALS</b>						
						C.O.D.
						G.P.P. 915,000.00
						NET 813,442.86
						Disc. 98,257.14
						P.P.P. 915,000.00

Remarks: BY SALESMAN  
 Received in Good Condition

Prepared / Packed By: CHERRY    Checked By: MNUCE    Approved By: EVV    Customer Signature / Date

**D5: Customer's Signature** →

**D4: Name of Supplier** → AVESCO MARKETING CORPORATION  
**D1: Invoice Number** → 2009-15  
**D2: Invoice Date** → 04/27/2009  
**D8: Item Description** → ELEMENTARY & SECONDARY ARMOIR (WOOD & STEEL)  
**D9: Quantity** → 1,350.00  
**D10: Unit** → pc.  
**D11: Unit Cost** → 600.00  
**D12: Amount** → 915,000.00

**STEP 4**

# INSPECTION AND ACCEPTANCE REPORT DEEM FORM

## DEEM TOOL PROJECT INSPECTION AND ACCEPTANCE INFORMATION FORM

### GENERAL ACCEPTANCE DATA

A1 SAME SUPPLIER/DEALER AS IN DISBURSEMENT VOUCHER? (Encircle choice.)

1 Yes      2 No

A1N IF NO, INDICATE NAME OF THE SUPPLIER INDICATED IN THE INSPECTION AND ACCEPTANCE REPORT \_\_\_\_\_

A2 SAME CONTRACT NUMBER AND DATE IN CONTRACT? (Encircle choice.)

1 Yes      2 No

A2N IF NO, INDICATE NAME OF THE SUPPLIER INDICATED IN THE INSPECTION AND ACCEPTANCE REPORT

CONTRACT NUMBER (1)	DATE (2)

A3 SAME INVOICE NUMBER AND DATE IN CONTRACT? (Encircle choice.)

1 Yes      2 No

A3N IF NO, INDICATE INVOICE NUMBER AND DATE IN THE INSPECTION AND ACCEPTANCE REPORT

INVOICE NUMBER (1)	DATE (2)

A4 NAME OF SCHOOL \_\_\_\_\_

A5 DATE ITEM WAS RECEIVED IN PROPERTY SECTION  
 \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
 (MM/DD/YYYY)

A6 WITH SIGNATURE OF PROPERTY OFFICER? (Encircle choice)

1 Yes      2 No

A7 NATURE OF ACCEPTANCE? (Encircle choice.)

1 Complete      2 Partial

A8 WITH STAMP OF INSPECTION AND ACCEPTANCE? (Encircle choice)

1 Yes      2 No

A8Y IF YES, INDICATE NAME OF SIGNATORY AND DATE OF STAMP

SIGNATORY (1)	DATE (2)

### DETAILS ON ITEMS ACCEPTED

A9 SAME ITEM DESCRIPTION AS IN CONTRACT? (Encircle choice.)

1 Yes      2 No

A9N IF NO, WRITE THE ITEM DESCRIPTION IN THE INSPECTION AND ACCEPTANCE REPORT \_\_\_\_\_

A10 UNIT \_\_\_\_\_

A11 SAME QUANTITY AS IN CONTRACT? (Encircle choice.)

1 Yes      2 No

A11N IF NO, WRITE THE QUANTITY IN THE INSPECTION AND ACCEPTANCE REPORT

1 Yes      2 No

D12 AMOUNT \_\_\_\_\_

### REMARKS/OBSERVATIONS



# Sample Inspection and Acceptance Report

**INSPECTION & ACCEPTANCE REPORT**  
**DEPARTMENT OF EDUCATION**  
 (Agency)

Supplier: [Redacted]

Contract No. [Redacted] Date: [Redacted] Invoice No. [Redacted] Date: [Redacted]

Name of School: Trinidad and Tobago NHTS Tel. No. [Redacted]

Address of School: Trinidad and Tobago Division: Carriacou Region: [Redacted]

Item No.	Unit	Description	Quantity
		<b>Item Description (Including Unit Cost)</b> Unit Cost = Php (Inclusive of delivery cost)	
		<b>Technical Specifications:</b> Top Board: 20mm thk. Solid wood Seat Slats: 2 - 20 x 70mm solid wood 4 - 20 x 45mm solid wood Backrest: 1 - 20 x 100mm solid wood 1 - 20 x 50mm solid wood Frame: 20mm dia. B.I. tube sched. 20 Book rack: 20mm dia. B.I. tube sched. 20 <b>Dimensions:</b> Seat Height: 400 mm Seat Depth: 400 mm Seat Width: 430 mm Writing Board Height: 650mm Backrest Height: 800 mm Writing Board Width: 250 mm Writing Board Depth: 255 mm	300 pcs.

Date Inspected: 10-06-08 Date Received: 10-06-08

Inspected, Verified and found OK as to quality and specifications.  
 [Redacted Signature]  
 Inspecting Official (School Personnel)  
 (Signature Over Printed Name)

Complete  
 Partial

[Redacted Signature]  
 School Property Custodian  
 (Signature Over Printed Name)

Contact No. 09164404081 (Cellphone #)  
 (landline)

**STEP 4**

## How to Fill Out the Inspection and Acceptance Report Information Form:

1. Refer to the DEEM form on the left. Look for the coded numbers (e.g. A1, A2, etc.) on the sample inspection and acceptance form above. Use these as a guide to fill out the DEEM Project Inspection and Acceptance Information form.

**ABSTRACT OF BIDS DEEM FORM**

DEEM TOOL PROJECT ABSTRACT OF BIDS INFORMATION FORM													
GENERAL BIDDING DATA													
<p>B1 ABSTRACT OF BIDS DATE _____ (MM/DD/YYYY)</p> <p>B2 DATE OF BIDDING _____ (MM/DD/YYYY)</p> <p>B3 MODE OF PROCUREMENT _____</p> <p>B4 DATE OF AWARD RECOMMENDATION _____ (MM/DD/YYYY)</p> <p>B5 HOW MANY WERE INVITED? _____</p> <p>B6 HOW MANY PARTICIPATED? _____</p> <p>B7 HOW MANY MEMBERS DOES THE BAC HAVE? _____</p> <p>B8 WAS THERE AN INVITED OBSERVER? (Encircle choice.)  1 Yes      2 No</p>	<p>B9 HOW MANY BAC MEMBERS SIGNED? _____</p> <p>B10 ARE THER MISSING SIGNATURES OF MEMBERS DESIGNATED TO SIGN? (Encircle choice.)  1 Yes      2 No</p> <p>B10Y IF YES, WRITE THE NAME(S) OF THE BAC MEMBERS AND THEIR DESIGNATION WHO HAVE MISSING SIGNATURES</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">NAME OF BAC MEMBER (1)</th> <th>DESIGNATION (2)</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>			NAME OF BAC MEMBER (1)	DESIGNATION (2)								
NAME OF BAC MEMBER (1)	DESIGNATION (2)												
DETAILS OF BIDS													
LINE ITEM NUMBER (1)	ITEM DESCRIPTION (2)	QUANTITY (number and units) (3)	SUPPLIER/ DEALER (4)	UNIT PRICE (Php/Unit) (5)	AWARDED TO (6)								

**How to Fill Out the Abstract of Bids Information Form:**

1. Refer to the DEEM form above. Look for the coded numbers (e.g. B1, B2, etc.) on the sample Abstract of Bids form on the right. Use these as a guide to fill out the DEEM Project Abstract of Bids Information form.

# Sample Abstract of Bids

SCHOOL FURNITURE 2006

Republic of the Philippines  
 Department of Education  
 Region VII, Central Visayas  
 TAGBILARAN CITY SCHOOLS DIVISION  
 Tagbilaran City

Abstract of Bids as Calculated

No.	NAME OF BIDDERS	Total Calculated Bid Amount	BID SECURITY					Remarks
			Form	Issued By	Validity Period	Amount	% to Calculated Bid Amount	
1	Bidder 1 <i>Sumadot Lumber and Furniture</i>	<i>395,467.00</i>	<i>BANK ACCT.</i>	<i>UCPA - Region VII</i>	<i>11/18/06</i>			
2	Bidder 2							
3	Bidder 3							
4	Bidder 4							

[Redacted]      [Redacted]      [Redacted]      [Redacted]  
 BAC-Chairman      BAC-V-Chairman      BAC Member      BAC Member  
  
[Redacted]      [Redacted]      [Redacted]      [Redacted]  
 PMO/End User      Head TWG      Representative      Representative

## On the Abstract of Bids

- Abstract of Bids is a summary of what transpired during the bid opening.
- Get Information per item.

STEP 4

# 4.1

## GETTING THE MARKET COST

After getting the actual cost, then it is now time to get the market cost.

The market cost is the amount that the open market is willing to give for bulk orders.

The reason for getting the amount for bulk orders or the wholesale price is that the DepEd is also procuring in bulks. We want to compare two wholesale prices.

### How to get the Market Cost

In getting the market cost, volunteers would have to get it from other suppliers that manufacture armchairs.

It is ideal for you to get market prices from suppliers within the region where the delivery was made. For example, if the chairs were delivered in Tarlac, then it is suggested that you get prices of the suppliers first within Region III. In the remote possibility that there is none, then you could ask for suppliers in the nearest region.

### Getting the Cost Differential

If you would remember, in order to get the differential, the equation is:

$$\text{Actual cost} - \text{Market cost} = \text{Differential}$$

Actual Cost is the amount actually paid to the supplier. Under the DEEM forms, this refers to the Check Amount.

Market Cost is the amount that the open market is willing to give for bulk orders.

For example, if the check amount is P156,000 for 200 chairs, and after doing the market survey, you gathered that a supplier could give 200 chairs for P140,000.

So:

$$\begin{array}{rcccl} \text{P156,000} & - & \text{140,000} & = & \text{16,000} \\ \text{(Check Amount)} & \text{(minus)} & \text{(Market Cost)} & & \text{(Differential)} \end{array}$$

In analyzing the said equation, it actually says that the procuring entity could have procured 200 chairs at the amount of P140,000, but actually paid P156,000 for it. In short they could have saved P16,000 on their procurement.

Here's another example:

If the check amount is P140,000 for 200 chairs, and after doing the market survey, you gathered that a supplier could give 200 chairs for P156,000.

So:

$$\begin{array}{r r r r r} \text{P140,000} & & \text{—} & & \text{156,000} & & = & & \text{-16,000} \\ \text{(Check Amount)} & & \text{(minus)} & & \text{(Market Cost)} & & & & \text{(Differential)} \end{array}$$

The equation actually says that although the market dictates that the procuring entity could have paid P156,000 for 200 chairs, they actually bought the 200 chairs for only P140,000. The difference of P16,000 represents the savings of the agency.

# 5

## REPORTING AND EXACTING ACCOUNTABILITY

During this stage, you have already accomplished the following:

1. Organized into teams, groups, association or corporations;
2. Signed MOA with the DepEd;
3. Trained on the procurement law;
4. Observed a bidding proceeding;
5. Participated during the pre-delivery inspection;
6. Monitored the delivery of the school furniture;
7. Joined the post-delivery inspection;
8. Obtained bidding documents;
9. Filled out the DEEM forms; and
10. Preliminary Assessment of the DEEM findings.

### Reporting Requirements

Upon reaching this stage, you should have made the following reports:

1. **Diagnostic Report** – a report containing your observations regarding the bidding procedures monitored;
2. **Pre-Delivery Inspection Report** – a report containing your observation during the pre-delivery inspection;
3. **Delivery Report Form** – a report containing your observations during the delivery of the school furniture;
4. **Post-Delivery Inspection Report** – a report containing your observations during the post-delivery inspection;
5. **DEEM Forms** – these are the forms to be filled once you get the procurement documents; and
6. **Preliminary Report** – this contains the initial findings on the DEEM assessment.

### Where and to whom the reports should be submitted

1. **Diagnostic Report.** This report is submitted to the Head of the Procuring Entity, copy furnished to the Bids and Awards Committee Chairman.

2. ***Pre-delivery Inspection Report, Delivery Report Form and Post-Delivery Inspection Report, DEEM Forms, and Preliminary Report.*** These forms should be submitted to your respective CVC.

## **Exacting Accountability**

The following persons are accountable during the following stages:

1. ***Bids and Awards Committee.*** This is the committee responsible for the conduct of the bidding procedure. The diagnostic report shall be submitted to the Chairman of the BAC, and copy furnished the head of the procuring entity.
2. ***Suppliers.*** Should there be a finding during the pre-delivery inspection, then the furniture manufactured by the supplier shall be rejected. If there is a finding during the delivery stage, the supplier shall be accountable for it as well.
3. ***Signatories.*** Depending on what government form you find an irregularity on, then the signatories on that form shall be accountable. For example, if there is an irregularity on the purchase request, then whoever is the person signing as the requesting person shall be responsible for giving an explanation on the said irregularity.

## **Sustaining the Monitoring Efforts**

Once you have undergone all the phases of the project, it will now be a huge task to sustain the efforts.

Here are some suggestions in order to sustain the efforts:

1. Should you have successfully entered into a Memorandum of Agreement with the DepEd, it would be best to renew your partnership with them.
2. Join or volunteer bigger groups. Chances are they may have potential funding to continue the endeavour.
3. Should you feel confident that your volunteer base is ready to continue monitoring efforts, you may want to set up your organization and have yourselves registered!
4. Newly formed and registered groups are strongly encouraged to undergo a resource mobilization training in order to address issues of sustainability (see Annex L for diagrams and tips that could be used in resource mobilization).

5. For parents, it would be a fine recommendation to include the monitoring of school furniture as an annual activity. Further, parents pay a certain amount for the activities of the PTA. This way, the parents would see that the amount they pay is put to good use.
6. Engagement with the local government may be a possible option. The budget of the Local School Boards can be used for the construction, repair or maintenance of facilities of public elementary and secondary schools.<sup>20</sup> Local Governments may provide assistance, financial or otherwise, to non-government organizations for socially oriented projects to be implemented within their respective areas of jurisdiction.<sup>21</sup>

The above list is merely suggestions. Your group may be able to think of other more creative ways of sustaining the project!

## **HAPPY MONITORING!**

It is the best wishes of Procurement Watch, Inc. that your organization would be able to participate and sustain this undertaking.

Just think, by joining and continuing this project:

- You help ensure that the government is doing their jobs as public servants!
- You will be able to see that part of the taxes you pay for actually go to social services. You will see tangible products of your hard-earned money!
- You will be able to assert your right as citizens within your community!
- Your voice will matter in the planning of the DepEd for their next procurement cycle. You will be empowered!
- Most of all, you are helping the children within your community to get the furniture they deserve. By doing this, the students would be comfortable in their respective seats, while listening to the lectures!

At the end of the day, you will be able to tell yourself that you were able to do something good for the community.

***It will be a rewarding and fulfilling experience!***

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<sup>20</sup> Section 100. Local Government Code, Philippines.

<sup>21</sup> Sec. 36. Local Government Code, Philippines





## LIST OF ANNEXES

Annex A:	Sample Letter of Introduction
Annex B:	Sample Memorandum of Agreement
Annex C:	Volunteer Information Sheet
Annex D:	Pledge of Commitment
Annex E:	Code of Conduct for Observers and Monitors
Annex F:	Sample of Diagnostic Report
Annex G:	Beginning Inventory Count Report
Annex H:	Creation of Inspectorate Team, Roles and Responsibilities
Annex I:	Pre-Delivery Inspection Form
Annex J:	Actual Delivery Report Form
Annex K:	Ending Inventory Count Report
Annex L:	How to Measure Armchairs
Annex M:	Resource Mobilization Diagrams and Tips

**ANNEX A:  
Sample Letter of Introduction**

(Organization Letterhead)

Date:

(Name of BAC Chairman)  
(Name of the Procuring Entity)  
(Address of the Procuring Entity)

Dear (Name of BAC Chairman):

Section 13 of Republic Act No. 9184, otherwise known as the Government Procurement Reform Act (GPRA) provides that “to enhance the transparency of the process, the BAC shall, in all stages of the procurement process, invite, in addition to the representative of the Commission on Audit, at least two (2) observers to sit in its proceedings, one (1) from a duly recognized private group in a sector or discipline relevant to the procurement at hand, and the other from a non-government organization: Provided, however, That they do not have any direct or indirect interest in the contract to be bid out.”

Section 13.2 of the Implementing Rules and Regulations of the GPRA further provides that “the observers shall come from an organization duly registered with the Securities and Exchange Commission (SEC), and should meet the following criteria:

1. Knowledge, experience or expertise in procurement or in the subject matter of the contract to be bid;
2. Absence of direct or indirect interest in the contract to be bid out; and
3. Any other criteria that may be determined by the BAC.”

(Briefly introduce your organization)

Being trained and knowledgeable on the procurement process, our organization has all the qualifications and is fit to act as observers during your bidding process. It is in this light that our organization is offering its services for free to act as observers to monitor your procurement process. We are hoping that our organization be invited to your future bidding activities.

Thank you.

Sincerely yours,  
(Name of Head of Organization)

**ANNEX B:**  
**Sample Memorandum of Agreement**

**MEMORANDUM OF AGREEMENT**

KNOW ALL MEN BY THESE PRESENTS:

This Memorandum of Agreement (the Agreement) entered into and executed by and between:

Procurement Watch INC., a non-stock, non-profit organization, duly registered and existing under and by virtue of Philippine laws, with principal office address at Unit 2507, Medical Plaza Ortigas, San Miguel Avenue, Ortigas Center Pasig City, represented by its President, Mr. Virgilio S. Santos and hereafter referred to as "PWI"

-and-

Department of Education, an agency of the Government, with principal office at DepEd Complex, Meralco Avenue Avenue, Pasig City, represented herein by Undersecretary Teodosio C. Sangil and hereinafter referred to as "DepEd"

Witnesseth: That-

WHEREAS, DepEd recognizes that Republic Act No. 9184, otherwise known as the Government Procurement Reform Act ("GPR") was promulgated in line with the efforts of the government to uphold transparency, efficiency and economy in government procurement;

WHEREAS, the GPR covers all branches and instrumentality of the Government, its departments, offices and agencies, including government owned and controlled corporations as well as local government units;

WHEREAS, Section 13 of the GPR mandates that the Bids and Awards Committee shall invite, in all stages of the procurement process, observers to monitor their bidding procedures;

WHEREAS, in line with the policy of the government, DepEd has issued Department Order No. 59 series of 2007, institutionalizing non-government organization and private sector participation in the Department's procurement process, including but not limited to PWI;

WHEREAS, the same Department Order encourages the participation of non-government organizations as well as the private sector and the local community in observing the procurement procedures as well as contract implementation;

WHEREAS, PWI offers, without consideration, its services to the DepEd Central Office, and its different divisions as specifically provided for in this agreement, to act as observers in their public bidding as well as monitors in the implementation of the contract as allowed under Government Procurement Reform Act (GPRA) and other existing laws and rules;

WHEREAS, DepEd recognizes and accepts the offer of PWI, it being in line with the policy of both the government and DepEd of furthering transparency in the procurement process;

NOW, THEREFORE, for and in consideration of the foregoing premises, the parties have hereto agreed as follows:

### **COVERAGE**

The Agreement shall be implemented in four (4) phases namely; pre-implementation phase, monitoring of the procurement or bidding process, the monitoring of the implementation of the contract, and the application of the Differential Expenditure and Efficiency Measurement (DEEM) Tool, a tool developed by PWI to empirically measure efficiency in government procurement.

The pilot sites for this Agreement are seven (7) School Division Offices of the DepEd specifically seven (7) schools under the said divisions namely:

1. La Union Division Office
  - Naguilian National High School
2. Ilocos Norte Division Office
  - Sarrat Luis Elementary School
3. Pangasinan Division Office
  - Bayambang National High School
4. Tarlac Division Office
  - Capas High School
5. Bohol Division Office
  - Lourdes High School
6. Davao Division Office
  - Sta. Ana National High School
7. General Santos Division Office
  - H.N. Cahilsot CES

### **SCOPE OF WORK**

PWI, and DepEd agree that they shall undertake and perform the following tasks and services:

*PWI:*

Phase I. Pre-implementation phase

1. Develop tool kits for procurement and contract implementation monitoring volunteers
2. Identify volunteers/observers to monitor the bidding of school furniture.
3. Identify volunteers/ grassroots organizations in preparation for the monitoring of the contract implementation
4. Send information to the different divisions informing the latter of the tentative schedule of PWI in conducting the monitoring phase
5. Send a letter to the different divisions requesting for initial contact persons from their area.
6. Coordinate with local volunteers

Phase II. Monitoring of the Bidding Process

1. Monitor all procurement stages of the DepEd Central Office specifically the School Furniture Project which includes but not limited to: Pre-Procurement Conference, Pre-Bid Conference, Bid Opening, Bid Evaluation, Post Qualification and Special Meetings of the BAC on project under procurement
2. Draft and submit diagnostic reports stating their findings on the procurement process especially the use of alternative modes of procurement
3. Gather all project documents including but not limited to disbursement vouchers, purchase orders, delivery receipts and inspection and acceptance reports in preparation for the conduct of the DEEM.

Phase III. Monitoring of the contract implementation

Pre-delivery phase

1. Conduct town hall meetings with the communities in the different divisions to orient them with the project and recruit volunteers
2. Conduct a beginning inventory of the chairs in the classrooms of the select schools
3. Research for prices of chairs from suppliers within the province, in preparation for the conduct of the DEEM
4. Draft report for each activity conducted under this phase

Actual delivery phase

1. Conduct monitoring during actual delivery
2. Mobilize volunteer monitoring teams with proper identification
3. Draft reports stating findings on contract implementation

4. Consolidate all reports submitted by monitors

#### Phase IV. Application of the DEEM Tool

1. Determine efficiency indicators and factors to be considered.
2. Filling out of the DEEM forms
3. Conduct market research on the prices of chairs from suppliers both from within the province of the select schools and outside the province
4. Process data gathered
5. Develop a price index of the school furniture included in the project
6. Submit the developed price index to DepEd.

#### *DepEd:*

#### Phase I. Pre-implementation Phase

1. Endorse PWI to the different division offices
2. Assist PWI in the identification and selection of volunteers/observers
3. Assign a point person for every Division that would be tasked to coordinate with the PWI in the conduct of the project
4. Provide venue for Focus Group Discussions whenever necessary

#### Phase II. Monitoring of the Bidding Process

1. Provide PWI and other observers trained by the former with relevant project documents and information such as but not limited to:
  - Minutes of related proceedings of the BAC
  - Abstract of Bids
  - Post-qualification summary report
  - APP and related PPMP; and
  - Copies of "opened" proposals
2. Provide PWI and other monitors trained by the former with photocopies of documents relevant to the contract being monitored such as but not limited to:
  - Copy of the approved contract
  - Purchase Request and Purchase Order
  - Invoice
  - Disbursement Vouchers
  - Delivery receipt
  - Inspection and Acceptance Report
3. Validate reports submitted reports in case of deviations from project specifications.

Phase III. Monitoring of the contract implementation

1. Encourage division offices to attend the town hall meetings conducted by PWI
2. Comment on the report submitted by PWI

Phase IV. Application of the DEEM Tool

1. Provide the monitors of the relevant procurement documents in assessing the cost of the chairs
2. Attend consultation meetings when necessary

**DURATION OF THE AGREEMENT**

This Agreement shall be for a period of eighteen months commencing on \_\_\_\_\_ and ending on \_\_\_\_\_.

IN WITNESS WHEREOF, the parties have hereunto set their hands this \_\_\_\_\_ day of \_\_\_\_\_ 2008 at \_\_\_\_\_.

PROCUREMENT WATCH INC.

DEPARTMENT OF EDUCATION

By:

By:

\_\_\_\_\_  
ATTY. AMADOR F. ASTUDILLO  
President

\_\_\_\_\_  
HON. TEODOSIO C. SANGIL  
Undersecretary for Finance  
and Administration

Signed in the presence of:

\_\_\_\_\_

\_\_\_\_\_





**ANNEX D:  
Pledge of Commitment**

## **Volunteer Pledge Form**

Ako si \_\_\_\_\_ . Bilang isang PWI Volunteer ako ay:

- Sumasangayon na maglilingkod ng tapat sa lahat ng oras;
- Pagsisikapang maipatupad ang mga sumusunod na tungkulin at alituntunin:
  1. Gampanan ang mga tungkulin ng isang Volunteer sa abot ng aking makakaya;
  2. Makipagtulungan sa kapwa Volunteer sa positibo at produktibong pamamaraan;
  3. Pangalagaan at suportahan ang adhikaing “Transparency at Accountability” sa proseso ng procurement at contract implementation/delivery;
  4. Sumunod sa mga alituntunin at suportahan ang pamamalakad ng Procurement Watch Inc. ukol sa proyekto na ito;
  5. Piliting tuparin ang naipangakong oras at responsibilidad at bigyan ng sapat na panahon upang makahanap ng pamalit kung sakaling hindi makakadalo sa mga miting, trainings, mga gawain sa pagbabantay sa delivery ng mga kasangkapang pang-eskwela;
  6. Maghahanda at gumawa ng monitoring report at iba pang report na kinakailangan sa proyekto;
  7. Pumunta sa mga pagpupulong na laging handa;
  8. Ayunan ang PWI “Code of Conduct at Ethics”;
  9. Tumulong sa pagsulong ng programa sa pamamagitan ng paghikayat ng mas marami pang Volunteer na tutulong upang maging matagumpay ang programa;

- Lubos kong nauunawaan at ipinahahayag na ako, at kagyat na miyembro ng aking pamilya ay walang interes na pampinasyal sa anumang pagbili ng DepEd ng School Furniture
- Sa anumang kadahilanan, kung ako ay hindi makatugon sa aking mga tungkulin, ako ay sumasangayon na magbitiw bilang isang VOLUNTEER
- Aking nabasa at nauunawaan ang mga salaysay na naglalathala sa mga alituntunin at pamantayan ng PROCUREMENT WATCH, INC. at sa abot ng aking makakaya ay susundin ang lahat ng mga ito. Lubos ko ring nauunawaan na sa aking paglagda sa lathalain na ito, ako ay pumapayag na isailalim sa isang pagsusuri na isasagawa ng PWI.

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Lagda ng Volunteer

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Petsa

## **ANNEX E: Code of Conduct for Observers and Monitors**

### **OBSERVERS/MONITORS CODE OF CONDUCT**

#### **How to be an Effective Observer/Monitor**

As CSO observers and monitors, we should be exemplars of good work ethic in carrying out our duties. As with other vocations, competence is very important if we expect to be taken seriously. Similarly, it is important for observers who participate in public bidding and monitors involved in contract implementation to conduct themselves properly. Observers and monitors must always bear in mind that they represent both their organization and public's interest therefore it is imperative to follow a code of conduct to be effective.

#### **Key Ethical Values**

PWI observers and monitors are expected to adhere and demonstrate the following key values when monitoring an activity or observing a public bidding. These serve as pillars by which observers and monitors should consider in the conduct of their duties. The following are the set of beliefs and ideals that PWI advocates:

- **Truth and Honesty:** Always adheres to facts and is against any form of cheating or fraud.
- **Integrity:** Moral soundness in executing volunteer duties.
- **Accountability:** Volunteers are responsible for their actions and are accountable to PWI and their respective organization's sanctions in case of policy violations.
- **Service to Common Good:** A sense of nationalism putting the betterment of others first before than one's self.
- **Adherence to the Rule of Law:** Doing what is right as stated in the law above despite one's own opinion or bias.

#### **Key Principles**

These key principles are a set of rules or standards which govern PWI volunteers. The following principles serve as a guide for observers and monitors alike during

the course of their engagement as volunteers. It is best that volunteers know, understand, and practice these principles as follows:

Declare any potential, perceived and/or actual conflict of interest. By doing so, the integrity of the observer and monitor is preserved and demonstrates a sense of accountability. The volunteer shall declare conflict of interest before observing any procurement activity or monitoring contract implementation/delivery of goods.

- **Adhere to facts when providing Diagnostic Reports.** All acts of the Bids and Awards Committee (BAC) that is not in compliance with the law should be included in the diagnostic report. The report shall also appraise the BAC if they conducted the procurement in compliance with the law.
- **Always refer to the GPRA** in providing concrete feedback and recommendations regarding the BAC's compliance to the bidding process.
- **Know the Bidding Documents and be familiar with its salient provisions** on the bidding and contract implementation/delivery phase.
- **Always be punctual.** The observers should be at the meeting venue at least 30 minutes before the activity convenes. This allows the observers to obtain pertinent documents through the BAC Secretariat (i.e. attendance sheets, PhilGEPS transmittal form, Invitation to Bid, etc.).
- **Observe proper grooming and always bring the volunteer toolkit** containing the GPRA Handbook, Public Bidding Checklist, Operational Guidelines, and the Memorandum of Agreement between DepEd and PWI.
- Be polite when asking intelligent questions and provide sensible feedback.

### **Code of Conduct:**

Observers and monitors must maintain their integrity to be able to stand up to public scrutiny. Thus, observers and monitors are expected to abide to the following:

1. The observer or monitor should notify the Community Volunteer Coordinator (CVC) and the PWI Project Officer (PO) in advance if s/he:
  - Is related to the bidder or any member of the BAC, BAC Secretariat, and Technical Working Group (TWG) up to the 3rd civil degree of affinity or consanguinity, or

- Has direct pecuniary interest to procurement at hand.

*If faced with this situation, the monitor or observer must abstain from participating in the activity. Examples of these would be:*

- The observer realizes that the bidding activity he/she is attending is the same project that his /her spouses's or close relative's company is also bidding for.
  - The monitor is informed that the contractor for the repair and rehabilitation of school classrooms is a close relative or a close friend.
2. Observers and monitors are prohibited from receiving any form of gratuity from bidders and contractors. By doing so, the observer/monitor may be beholden to the supplier/bidder, which could affect the formers independent judgment. An example of this would be sharing a ride with suppliers, dining with suppliers, or accepting gifts or favors from any contractor or bidder involved in the project at hand.
  3. The observer or monitor should carefully accomplish the diagnostic or monitoring report based on facts obtained through pertinent documents and occurrences witnessed first-hand during the conduct of procurement or contract implementation stage and submit it to the CVC or the PO in charge. For example, an observer may note that the secretariat has accepted bids beyond the deadline despite calling the attention of the BAC. If the violation was not immediately rectified, the observer should include it in his diagnostic report.
  4. Observers are prohibited from discussing relevant information related to the bidding activity to anyone as embodied in the confidentiality agreement between the procuring entity and the observer. Observers shall not jeopardize the information with any of the bidders from bid opening until the issuance of the Notice of Award. For example, observers are prohibited to divulge in advance results of the BAC evaluation.
  5. Observers should be knowledgeable of the provisions of the GPRA and its Implementing Rules and Regulations, and the bidding documents because, more often than not, the BAC treats them as experts. In the same manner, monitors should also be familiar with the bidding documents and contract implementation provisions.
  6. Observers/monitors should not be late. PWI-BE Volunteers should arrive the venue at least 30 minutes before the start of the activity. The observer or monitor could use the extra time familiarizing yourself with the 'rules of the game' or the bidding documents, obtain relevant copies of documents such as Invitation to Bid, Phil-GEPS transmittal form,

attendance sheets, etc. Volunteers should always be equipped with their volunteer tool kit, pen and paper.

7. Observers and Monitors attending a bidding activity should dress appropriately and wear their BE shirt. No short shorts, no slippers, no caps, and no sando are allowed as they are not considered proper and appropriate attire. Organizational sensitivity must be practiced by all volunteers because they carry the name of their organization.
8. Pro-actively participate in bidding activities in an orderly and courteous manner. The observers and monitors are highly encouraged to actively participate during the bidding and contract implementation stage. They must observe the proper procedure and signal or approach the BAC Secretariat to inform them that there is a matter that you wish to call the BAC Chairman's attention, or raise your hand and wait to be recognized before providing observations.
9. Observers and monitors should advise the CVC in case he/she is not able to attend the night before the scheduled activity in order for the CVC to deploy other available volunteers to attend the activity.

### **Volunteers Responsibility**

*Bantay Eskuwela* volunteers are also expected to exemplify the following the following values and philosophy:

1. To perform duties to the best of one's ability and advocate for transparency and accountability in a positive and supportive manner.
2. To support the advocacy of "Transparency and Accountability" in the procurement process and contract implementation/delivery.
3. To support and adhere to PWI's rules, policies, and procedures.
4. To meet time and duty commitments, or to provide adequate notice so that alternate arrangements can be made (e.g. attending local meetings, trainings, monitoring the delivery of school furniture, etc.).
5. To agree and adopt the PWI "Code of Conduct and Ethics."
6. To observe parliamentary procedures during meetings and be respectful of others.
7. To support, in a positive manner, all actions taken by PWI.

8. To assist in the development and growth of the program by seeking out volunteer opportunities and providing membership referrals.
9. Holding fast to these principles, the observer is likely to develop good relations with the DepEd where he/she is observing and monitoring. Moreover, this will foster an enabling environment that will encourage constructive and critical criticism.

### **Administrative Actions**

In case the CVC or volunteers are found to have violated the above-mentioned provisions, with due consultation, the following actions shall be implemented:

#### **Termination of Engagement:**

1. Non-performing/gross negligence of duties
2. Violation of policies
3. Engaging in corrupt practices

For items number 1 and 2, PWI will follow the 3-strike policy for corrective/ remedial measures as enumerated below:

#### **Procedure for the 3-strike Policy:**

1. Verbal and written warning shall be issued first to the volunteer that violates items 1 and 2.
2. If the volunteer fails to correct untoward behavior in spite receipt of the verbal and written warning, suspension shall be applied as determined by the head of the volunteer's organization, the CVC and the PWI steering committee composed of PWI Project Officers .
3. If the volunteer persists and fails to correct untoward behavior, suspension for 1 year shall be applied which may lead to end-of-engagement in BE community project initiative.



**ANNEX F:  
Sample Diagnostic Report**

**Name of Organization:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**DIAGNOSTIC REPORT**

**Section I: General Information**

Procuring Entity: [Name of Agency/LGU]  
[Complete Address of Procuring Entity]

Head of the Procuring Entity: [Complete Name of Head of Procuring Entity]

BAC Chairman: [Complete Name of BAC Chairman]

Project/ID No.: [Project Name/ID No.]

Funding: Funded under [Source of Funding] Funds with an Approved Budget of the Contract of Php [Amount]

**Section II. Bidding Procedures:**

I. Please check appropriate box:

*A. Procurement Type*

Goods

Infrastructure

Consulting Services

*B. Type of Bidding*

Competitive Public Bidding

Alternative Mode of procurement

Please specify, type of Alternative Method: \_\_\_\_\_

II. Details of Procurement Stage Attended and Observations Made

Type of Document and Attachment No.	Date	Time	Place	Procurement Stage	Were there any deviations observed? (Y/N)	GPRA/IRR Provision Violated (If Any)

III. Please provide a brief narrative of deviation/s observed, if any:

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IV. Despite a formal letter of request to the BAC Secretariat, below is a list of other required documents that were not provided by the agency:

1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
  4. \_\_\_\_\_
  5. \_\_\_\_\_
- N. A.

Respectfully submitted by:

[Name and Signature of Observer]  
[Title/Designation]  
[Organization]

Cc: Resident Ombudsman/Office of the Ombudsman  
Head of Procuring Entity  
BAC Chairman

*Note:* All pages should be paginated.

**ANNEX G:  
Beginning Inventory Form**

**BEGINNING INVENTORY COUNT REPORT**

Name of Volunteer: \_\_\_\_\_ School/Room Number: \_\_\_\_\_  
 Inventory Site (Name of School): \_\_\_\_\_ Date of Inventory: \_\_\_\_\_  
 School Address: \_\_\_\_\_ Time Started: \_\_\_\_\_  
 \_\_\_\_\_ Time Ended: \_\_\_\_\_

Total Number of Classrooms: \_\_\_\_\_  
 Number of Class Shifts: \_\_\_\_\_

TO BE FILLED UP BY CVC/PWI	
Total Number of Students Currently Enrolled:	Ratio of Useable Armchair to Student:

Description of Armchairs	State of Armchair (indicate number of armchairs)			Total Number of Chairs of Chairs (D)= A+B+C	Total Number of Useable Armchairs (E)= A+B	Remarks
	Good (A)	Minor Repair (B)	Non-Useable (C)			
ALL WOOD						
WOOD and STEEL						
NON-WOOD (PVC & STEEL)						
OTHERS: (Specify)						

## **ANNEX H: Creation of Inspectorate Team, Roles and Responsibilities**

### **Creation of Inspectorate Team, Roles and Responsibilities**

The Inspectorate Team is the team in charge of the ensuring that the armchairs to be delivered would comply with the specifications as indicated in the bidding documents.

Since the procurement would be conducted at the Central Office, Regional Office, and at the Division Office, there would be three inspectorate teams as well. Their functions are enumerated by Department Order No. 26, series of 2008.

#### **Central Inspectorate Team**

The Inspectorate Team at the Central Office shall be composed of personnel from the Physical Facilities and Schools Engineering Division, Accounting Office and Property Office.

The Inspectorate Team shall have the following functions:

1. Conduct pre-delivery inspection of the school furniture prior to delivery to determine compliance with the technical specifications
2. Conduct post-delivery inspection of school furniture at the recipient schools prior to the issuance of the certificate of final acceptance
3. Prepares inspection report and recommends payments or non-payments of the contractor
4. Prepares Certificate of Acceptance

#### **Regional Inspectorate Team**

The Regional Inspectorate Team shall be created by the Regional Director. The Regional Inspectorate Team shall be headed by the Regional Physical Facilities Coordinator and will have two members.

The Regional Inspectorate Team has the same functions as those with the Inspectorate Team at the Central Office.

#### **Division Inspectorate Team**

The Division Inspectorate Team shall be created by the School Division Superintendent. The Inspectorate Team shall be headed by the Division Physical Facilities Coordinator and will have two members.

The Division Inspectorate Team has the same functions as those with the Inspectorate Team at the Central Office.

**ANNEX I:  
Pre-Delivery Inspection Form**

**Pre-Delivery Inspection Report**

Name of Volunteer: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Supplier/Contact Person: \_\_\_\_\_

Supplier's Address: \_\_\_\_\_

Manufacturer's Plant site: \_\_\_\_\_

Quantity (number) of school armchair to be produced and delivered? \_\_\_\_\_

Total amount of the contract? \_\_\_\_\_

When is the delivery date? \_\_\_\_\_ Partial Complete

If partial, when is the next delivery? \_\_\_\_\_ Quantity of next delivery? \_\_\_\_\_

When is the 3rd delivery? \_\_\_\_\_ Quantity of 3rd delivery? \_\_\_\_\_

Area of Delivery/Delivery Sites for regional and provincial (Please ask for their delivery schedules.):

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

Names of the DepEd Inspectorate Team:

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

Supplier	YES	NO	REMARKS
1. Does the manufacturer have its own methods and standards in the fabrication/production of armchairs?			
2. Were there enough workers (manpower vs total production)?			
3. Are there quality control procedures/standards followed by the workers in the production of armchairs to assure that the work is performed in accordance with specification?			
4. Are the armchairs produced in accordance with the approved specification?			

Deped Inspectorate Team	YES	NO	REMARKS
1. Does the inspection procedure ensure that technical specifications are met?			
2. Have armchairs with stickers pass quality control?			
3. Are the attached stickers enough?			<p>How many chairs have stickers?</p> <p>How many schools will receive the delivery?</p>
4. Is the supplier advised to proceed with the delivery of armchair?			

Comments: (Please report damages, shortages, substitution if there is any)

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Counted by:

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**Name and Signature of Volunteer**

**ANNEX J:**  
**Actual Delivery Report Forms**

**Actual Delivery Report**

Date of Delivery: \_\_\_\_\_  
Time of Delivery (am/pm): \_\_\_\_\_  
Type of Armchairs Delivered: \_\_\_\_\_  
Quantity Delivered: \_\_\_\_\_  
Mode of Delivery (encircle choice):

1 Partial      2 Complete

If partial delivery:  
When is the next delivery? \_\_\_\_\_  
Quantity of next delivery? \_\_\_\_\_

Purchase Order Number: \_\_\_\_\_

AR Number: \_\_\_\_\_

Date: \_\_\_\_\_

Invoice Number: \_\_\_\_\_

Invoice Amount: \_\_\_\_\_

IAR Number: \_\_\_\_\_

Place of Delivery (Name of School): \_\_\_\_\_

School Address: \_\_\_\_\_

Division: \_\_\_\_\_

Name of School Principal: \_\_\_\_\_

Population of Enrolled Students for SY  
2008-2009: \_\_\_\_\_

Encircle choice:

1 With AM/PM class shift

2 Without class shift

Quantity of Requisitioned Item (indicated  
in the contract): \_\_\_\_\_

*Reminder: Please get a copy of the  
following from the property custodian:*

- Contract
- Delivery invoice,
- Inspection and acceptance report

Name of Supplier: \_\_\_\_\_

Address of Supplier: \_\_\_\_\_

Contact Number: \_\_\_\_\_

# ACTUAL DELIVERY COUNT REPORT - SECONDARY (ALL WOOD)

Name of School: \_\_\_\_\_ Date: \_\_\_\_\_

**Instructions:** Put a check if measurement is within the tolerance thickness and dimension. If not, write the actual measurement on the space provided. **(TOLERANCE: Thickness: +2mm, -2mm, All other dimensions: +10mm, - 10mm)**

Chair No.	Dimension of Secondary Armchair in Millimeter						Technical Specifications				Remarks	
	Seat Height (400)	Seat Depth (400)	Seat Width (430)	Backrest Height (800)	Writing Board Ht. (640)	Writing Board Width (250)	Writing Board Depth (255)	Writing Board Length (625)	Seat Slot (4-20mmx45mm, 2-20mmx70mm, Tangleule)	Writing Board (20mm THK Solid Wood)		Back Rest (1-20x100mm Tangleule 1-20x50mm Tangleule)
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												

Name of Volunteer: \_\_\_\_\_ Page \_\_\_\_ of \_\_\_\_



# ACTUAL DELIVERY COUNT REPORT - ELEMENTARY (ALL WOOD)

Name of School: \_\_\_\_\_ Date: \_\_\_\_\_

*Instructions:* Put a check if measurement is within the tolerance thickness and dimension. If not, write the actual measurement on the space provided. **(TOLERANCE: Thickness: +2mm, -2mm, All other dimensions: +10mm, - 10mm)**

Chair No.	Dimension of Secondary Armchair in Millimeter						Technical Specifications				Remarks	
	Seat Height (380)	Seat Depth (370)	Seat Width (390)	Backrest Height. (710)	Writing Board Ht. (623)	Writing Board Width (250)	Writing Board Depth (255)	Writing Board Length (625)	Seat Slot (4-20mmx45mm, Tangle & 2-20mmx70mm, Tangle)	Writing Board (20mm THK Solid Wood)		Back Rest (1-20x100mm Tangle 1-20x50mm Tangle)
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												

Name of Volunteer: \_\_\_\_\_ Page \_\_\_\_ of \_\_\_\_

# ANNEX K: Ending Count Form

## ENDING INVENTORY COUNT REPORT

School/Room Number: \_\_\_\_\_

Name of Volunteer: \_\_\_\_\_ Date of Inventory: \_\_\_\_\_

Inventory Site (Name of School): \_\_\_\_\_ Time Started: \_\_\_\_\_

School Address: \_\_\_\_\_ Time Ended: \_\_\_\_\_

Total Number of Classrooms: \_\_\_\_\_

Number of Class Shifts: \_\_\_\_\_

TO BE FILLED UP BY CVC/PWI	
Total Number of Students Currently Enrolled:	Ratio of Useable Armchair to Student:

Description of Armchairs	State of Armchair (indicate number of armchairs)			Total Number of Chairs (D)= A+B+C	Total Number of Useable Armchairs (E)= A+B	Remarks
	Good (A)	Minor Repair (B)	Non-Useable (C)			
ALL WOOD						
WOOD and STEEL						
NON-WOOD (PVC & STEEL)						
OTHERS: (Specify)						

**ANNEX L:  
How to Measure Armchairs**



**Seat Height**  
Elementary: 380mm  
Secondary: 400mm



**Seat Depth**  
Elementary: 370mm  
Secondary: 400mm



**Seat Width**  
Elementary: 380mm  
Secondary: 430mm



**Backrest Height**  
Elementary: 710mm  
Secondary: 800mm



### Writing Board Height

Elementary: 623mm

Secondary: 640mm



### Writing Board Width

Elementary: 250mm

Secondary: 250mm



### Writing Board Depth

Elementary: 255mm

Secondary: 255mm



### Writing Board Length

Elementary: 625mm

Secondary: 625mm



### Seat Slat

2 pieces: 20mm x 70mm



### Seat Slat

4 pieces: 20mm x 45mm



### Writing Board

20mm THK Solid Wood



### Backrest Slat

1 piece: 20mm x 100mm



### Backrest Slat

1 piece: 20mm x 50mm



### Wood Finish

Smooth finish with at least 3 coats of varnish

# ANNEX M: Resource Mobilization: Diagrams, Tools and Tips

## Definition

Resource mobilization is giving people the opportunity to give. It is not an end in itself but rather the process whereby resources are transferred from those who are able to give to those who have the need to receive. Resource mobilisation facilitates this process. It is the enabler of an activity that not only satisfies the need, but also satisfies the giver that the resources have been wisely and effectively used.

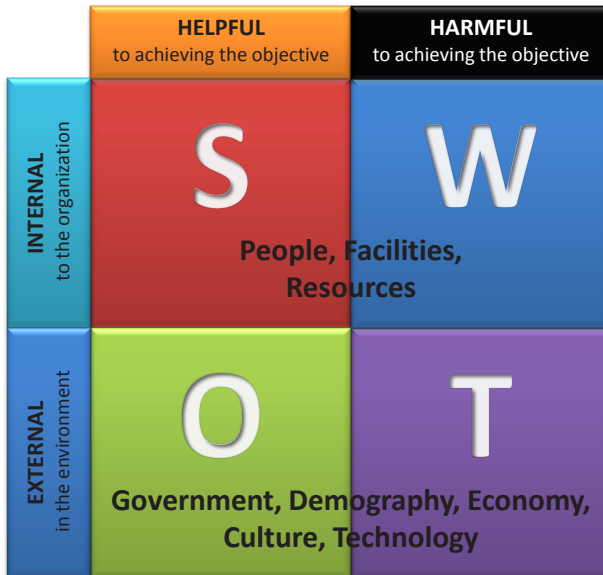
## Preparations Needed

Identify the objective of your organization that requires funding. This presupposes that a comprehensive project and/or programme and budget is already complete and in place. Otherwise, it is best to complete the organizations action plan first.

## Developing an Action Plan

It is of chief importance that the mission, vision, goals and objectives of the organization are set. They provide not only directions for the organization but also act as indicators of your success.

It is also recommended that the organization perform a Strength, Weaknesses, Opportunities, and Threats (SWOT) analysis of its environment. Your funding strategies should be based on the results of such analysis.



Remember, strengths and weaknesses should reflect internal characteristics, meaning they should be present within your organization. On the other hand, opportunities and threats are external characteristics, those factors outside the organization and are beyond its control.



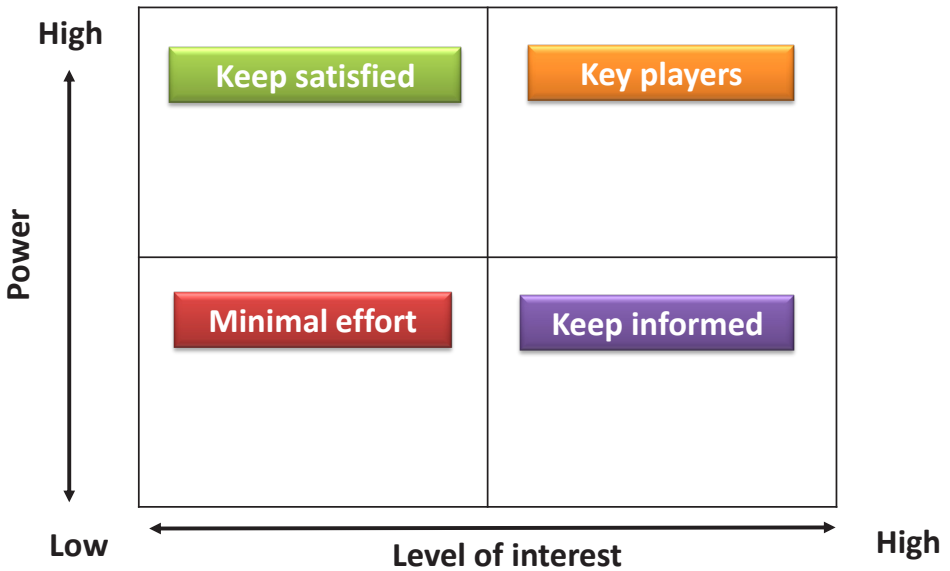
In the end, a simple action plan based on your organization’s SWOT analysis may look similar to the table below:

Activity	Indicator	Timeline	Responsible Person	Resources Needed

### Mapping the Donors

Map out and identify potential donors. There are many potential donors. They range from domestic corporations and/or foundations to international organizations. Resources can also come from the government or private charitable institutions. Research on who they are, what they do, and what motivates them.

After identifying the potential donors, use the table on the right in mapping out the donors and evaluate the degree of collaboration with them.



### Tools and Techniques in Resource Mobilization

- **Proposal Writing.** This requires technical competency on the part of the organization. Research must be conducted on the needs and interests of the donors. Persuade them to support your project. Your organization needs to present an opportunity to give, in the most appealing way possible.
- **Solicitation Letters.** This is the most common tool used in generating funds. This could be sent to most private corporations and institutions.
- **Organizing events.** Fun runs, bake sale, raffles, bazaars, and concerts are only some of the events that you can organize in order to raise money and other resources.











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