



PLAN
INTERNATIONAL



**Consultancy service for Gender Equality and Social Inclusion Analysis:
USAID Equity and Inclusion in Education Activity**

Main Facts Table	
Request for Proposal (RFP) Reference	Ref No: 018-023/024
RFP launch date	8 March 2024
Deadline for submission of offers	22 March 2024

Organization Information	
Name of the organization:	
VAT/ PAN registration number:	
HAS A TAX CLEARANCE CERTIFICATE BEEN SUBMITTED? :	YES/NO
Contact person's name:	
Contact details:	Telephone:
	Cellphone
	Address:
	Email:
	Other:
Additional Contact Information:	
SIGNATURE AND COMPANY STAMP	
DATE:	



Terms of Reference (ToR)

Gender Equality and Social Inclusion Analysis: USAID Equity and Inclusion in Education Activity

1. Background Information on Plan International

Plan International is an independent development and humanitarian organization that advances children's rights and equality for girls. We believe in the power and potential of every child. But this is often suppressed by poverty, violence, exclusion and discrimination. And it is the girls who are most affected.

Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children. We support children's rights from birth until they reach adulthood. And we enable children to prepare for - and respond to - crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

Plan's refreshed global strategy 2022-2027 strives to achieve a world where all girls are standing strong creating global change. To achieve this ambition, our goal until 2023 is: Girls and young women in all of their diversity reach their full potential as equal and active citizens in both development and humanitarian settings.

Read more about Plan International's Global Strategy: 100 Million Reasons at <https://plan-international.org/strategy>

About the commissioning office

Plan International has been working in Nepal since 1978, helping marginalized children, their families and communities to access their rights to Early Childhood Development, child protection, education, Vocational Skills, girls' empowerment and sexual reproductive and health rights (SRHR), water sanitation and hygiene, and disaster risk reduction. Plan International Nepal's programs are implementing in 11 districts through our local implementing partners.

2. Background/Context

USAID Equity and Inclusion in Education is a five-year activity implemented in two provinces in Nepal (Karnali and Madhesh) by Plan International, Aasaman, Karnali Integrated Rural Development and Research Centre (KIRDARC), Open Learning Exchange (OLE) Nepal, and Inclusive Development Partners (IDP). The Activity will contribute to improved equitable

education outcomes for marginalized youth in grades 6-10 by focusing on three primary objectives:

1. Reduce barriers to access and retention in grades 6-10.
2. Improve quality of education for marginalized students in grades 6-10.
3. Ensure quality implementation of disbursement-linked indicators related to equity and inclusion activities under the MOEST's School Education Sector Plan Illustrative Indicators.

The Activity will partner with local CSOs, youth organizations, schools, local governments (LGs), parent teacher associations (PTAs), and provincial governments to deliver a suite of interventions aimed at improving access and retention, quality of education in formal schooling, improving the classroom experience for marginalized learners, and strengthening systems for the ability of schools and LGs to monitor and report on equity-related disbursement linked indicators mutually endorsed by the Ministry of Education, Science and Technology (MoEST) and Joint Financing Arrangement (JFA) partners. Through these partnerships, the Activity will work to ensure that project interventions are properly contextualized to address the specific challenges that individual communities face.

During the inception phase of the activity, the team will work closely with a consultant to conduct a gender equality and social inclusion (GESI) analysis to inform the activity's approach to addressing gaps in marginalized populations' access to and participation in education at the systems, institutional, community, and individual levels. Marginalization in Nepal can be the result of gender, caste, disability status, socio-economic status, and ethnicity. The dominant drivers/factors of marginalization could be different in Madhesh province and Karnali province. This analysis seeks to identify these factors and gain further information (including additional disaggregated data) on the intersectionality of these factors of marginalization, and how they affect learners and their families.

A consultant (hired by Plan International) will lead the GESI analysis to examine barriers to educational access and quality of learning outcomes for marginalized groups in the two provinces of Madhesh and Karnali, focusing on identifying the most prevalent discriminatory and harmful social norms in communities and schools. The GESI analysis will shed light on the areas of improvement needed to achieve the Disbursement Linked Indicators (DLIs) related to equity and inclusion. The GESI analysis will also explore the differences among marginalized groups of students in these provinces in relation to their condition and position in the community, access to educational services, learning outcomes, distribution of resources, receiving opportunities, and power dynamics in relation to agency and leadership opportunities within the scope of Activity interventions. The GESI analysis will build on existing relevant GESI-related work covering best practices or approaches to inclusion and equity in secondary education in the country, including previous analyses that have been carried out for USAID or other donors. The consultant(s)

will use this existing information as a starting point and conduct supplemental research to fill in any information gaps required to complete the analysis in a disaggregated form.

The analysis will be used to inform our approaches to effectively deliver interventions to learners belonging to marginalized communities such as girls, children with disabilities, children in impoverished families, Dalits and linguistic minorities in the target provinces of Madhesh and Karnali. The analysis will serve as a basis to develop a robust GESI Action Plan that the team will use throughout the program duration to inform the planned interventions. The GESI Action Plan is intended to be a living document, continuously updated throughout the life of the project to reflect realities on the ground. The GESI Action Plan will be concise and specific to include the following at a minimum: a) key recommendations from the GESI analysis b) priority GESI issues/barriers to be addressed c) actions to close the gaps d) GESI indicators and e) results (gaps closed).

3. Description & Objectives

Purpose

This analysis is expected to capture the type and level of engagement and empowerment that is possible for marginalized groups (both students and caregivers) without jeopardising their safety and security in the public (school, community) and private (home) spaces and the protective measures needed. The analysis is expected to capture decision-making functions, roles and examples that have positively contributed to access to quality education, and will be disaggregated by marginalized group and by province:

1. Identify the dominant factors of marginalization and the impacted groups in both Karnali and Madhesh provinces that are acting as barriers to quality education (access, participation and learning).
2. Identify barriers, norms, and enabling behaviors related to educational access and achievement in the two provinces at the individual/household, community, and institutional level to support in shaping the project strategies and approaches.
3. Analyze the level, type and extent of positive and negative shifts in social norms and trends that have occurred and are taking place as a result of broader shifts within Nepal or due to other targeted programming in the two target provinces at the household, community, and institutional level in relation to GESI.
4. Capture the methods, techniques, approaches and strategies that have worked in reaching and supporting marginalized groups in Karnali and Madhesh to achieve activity objectives (improved access, retention, and quality of education).
5. Review the functionality of existing (if any) formal or informal support structures for marginalized groups in the communities in the two provinces.
6. Use analysis of past or existing programming to help the project identify suitable entry points for programming, as well as opportunities that can be leveraged to avoid duplication of efforts.

7. Develop a set of actionable short, medium and long-term recommendations for the project, based on key findings.

The final objectives for the area of inquiries will be agreed upon and approved by the consultant(s) and the project team.

Methodology/ Questions

The proposed methodology (including but not limited to) has been outlined below:

Literature Review: The GESI analysis team will conduct a brief and targeted desk review of the relevant secondary data sources in order to identify gaps in information and focus the data collection plans. The team will examine relevant Nepali legal frameworks, policies, strategies, and action plans on GESI; literature on social, political, and economic inclusion and gender equality in Nepal (particularly any literature focused on the target provinces); USAID policies and provisions on gender equality and women's and girls' empowerment, persons with disabilities, and social inclusion; previous GESI analyses conducted or supported by USAID/Nepal; and selected research documents.

Through the literature review and in consultation with the project team, the GESI analysis team will identify key stakeholders for primary data collection in the two provinces, with emphasis on members of marginalized groups (youth and their caregivers) and individuals who work with or support them, such as educators, members of youth organizations, other civil society organizations (CSOs), and organizations of persons with disabilities (OPDs), as well as local government officials, and community members.

Primary Data Collection—Fieldwork: The GESI analysis team will conduct primary data collection in Karnali and Madhesh provinces, applying a mixed-methods approach for field research, which will be informed by the initial literature review and situational analysis. The field research will include semi-structured key informant interviews (KIIs), and focus group discussions. Given significant work to date on GESI in Nepal, the fieldwork will be designed to confirm the factors identified in the document review and solicit context-specific recommendations that address identified gaps and challenges and highlight effective practices relevant to the Activity's objectives. This activity will be conducted in a disaggregated form for the provinces, and data collection tools (e.g., interview protocols) will be tailored to each province as appropriate, such that there will be some questions (and subsequent data) that are relevant to both provinces, but several questions that are unique to each one. Data collected from various stakeholders will assess their existing engagement with the inclusion and equity objectives of the activity as well as their capacity to collaborate and partner to further meet the objectives.

Data Analysis: To analyze the data, the GESI analysis team will review the interview notes and identify key themes that align with the framework. The team will then analyze and interpret the data and draw conclusions around the main research questions. The senior consultant on the team will write the analysis findings.

Report Development and Dissemination: Findings will be synthesized into a targeted and concise GESI Analysis Report. While the report will briefly describe the purpose, context and background, methodology and limitations of the research, the focus will be on the findings, conclusions, and recommendations. These will also be succinct and to the point, focused on potential resulting actions. The report must not exceed 20 pages in length (without including the executive summary, appendices, lists of key informants, etc.).

GESI Action Plan Development: The GESI Analysis Report will serve as a basis to develop a robust GESI Action Plan that the Activity team will use throughout the program duration to inform the planned interventions. The GESI analysis team will assist the project team with development of the initial GESI Action Plan to address the findings in the analysis.

To be further refined, agreed upon and approved by the consultant team and the project team (and further contextualized and tailored to the individual provinces), the below are some research questions to start with:

1. What are the current economic, social and political governance structures, including descriptions and distinctions of gender roles (men's, women's and sexual and gender minorities), power and authority in the selected communities? What are considered as barriers for marginalized children including girls, children from different castes, children with disabilities and LGBTQIA+ children/youth to access and participate in education?
2. What do decision-makers and service providers in government do or fail to do that enables or prevents gender equality and inclusion? Why?
3. What changes have the community members observed recently, if any, with regard to perceptions of the social norms (especially related to education) in the community, and how do they explain or attribute these changes?
4. What are the societal trends around gender-based violence, including trends connected to early or forced marriage, and opportunities to mitigate risk (via secondary data)?
5. How can we engage men and boys to increase their understanding and involvement in promoting gender equality and changing power dynamics and to explore and develop non-violent positive masculinities?
6. How can we design and implement programming in a way that ensures learners in the target communities have equitable access to quality educational services and resources that lead to participation and learning?
7. Are any of the inclusion-related barriers to rights worse for particular social groups? If so, for which groups? Why?

8. What factors are acting as major barriers for out-of-school children/youths from marginalized groups to enter school in each of the two provinces?

A senior consultant (hired by Plan), assisted by a junior research assistant, will build off of USAID’s framework for GESI Analyses in addition to Plan International’s Gender Age and Inclusion Analytical Framework. Under this framework, GESI is analysed across the six domains, adopted by USAID, to identify existing constraints and opportunities:

1. Practices and Participation
2. Knowledge, Beliefs, and Perceptions (some of which are norms)
3. Access to Assets
4. Legal Rights and Status
5. Roles, Responsibilities and Time use
6. Personal safety and security

The research team will primarily collect disaggregated and qualitative data that is useful to determine the driving factors of marginalization in the two provinces. We anticipate that the team will need to carry out a separate primary data collection in both provinces.

Users

The primary user of this analysis is Plan International, partners, donors including USAID, and broader agencies who seek such analysis to inform their programming. Gender equality and inclusion measures, which are in line with and enhance our Values and Behaviours Framework, are seamlessly integrated into our organizational structure, operations, and work practices across all levels. This information and data will prove valuable in ensuring that all marketing, fundraising, sponsorship, campaigns, global education efforts, and media messages effectively convey and promote our unwavering commitment to gender equality, girls’ rights, and inclusion.

Methods for data collection and analysis

As mentioned above.

Participant selection

Plan International Nepal plans to engage an external consultant and their team to propose participant selection criteria and methodology in the inception report. Both parties will mutually agree upon the finalization of participant selection and methodology.

4. Deliverables and Timeline

Key Deliverables

The tentative time anticipated for completion of the assignment is 31 days between April to June 2024.

Deliverable(s)	
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GESI work plan and report outline	<p>The work plan will include a detailed description of how the GESI analysis will be carried out from beginning to end. It must include a detailed methodology for the GESI Analysis, detailed activities for the operationalization of the desk review and primary data collection, including proposed localities and timeline for fieldwork, and annexes to include any other relevant material. The consultant(s) is expected to rapid desk research in preparation for the analysis, based on which they will identify remaining gaps that necessitate field work for primary data collection or validation of secondary data.</p> <p>The Work Plan will include a proposed schedule of desk review activities and fieldwork, the timeline for data processing and analysis and drafting of the final report and GESI Action Plan, and any other relevant information regarding the study. It should be regarded as a living document; adjustments can be made in accordance with learning and in consultation with the project team.</p>
GESI Analysis Report	Findings will be synthesized into a GESI Analysis Report. The draft of the final report will include tables and graphs, a table of contents and acronyms, and appendices. The report must not exceed 20 pages in length (without including the executive summary, appendices, lists of key informants, etc.).
GESI Action Plan in USAID format	Based on the findings presented in the report, the consultant team will work together with the Project Team to develop a GESI Action Plan.

Consider the following in a table of Deliverables:

Deliverable	Format	Length	Due	Detail
What is the deliverable?	In what format does the deliverable need to be presented?	How long should this deliverable be (words/page numbers)	What is the indicative deadline for this deliverable	Including the intended user, report language etc.
Inception report (work plan / report outline)	Flexible	8-10 pages	7 days after contract signing	COP, DCOP, MERL, GESI
Field work	NA		Within one month of contract signing or as agreed in Inception.	Consultant
Data analysis	NA	flexible	7 days after completion of field work	Consultant
Draft report along with submission of all data collected	Provided template	Flexible	After completion of data analysis	Consultant

Deliverable	Format	Length	Due	Detail
Final GESI Analysis report including GESI action plan	Provided template	20 page	After draft report	Consultant
Report dissemination		N/A	After submission of final report	Consultant

Note: In the event that there is a change or additional deliverables during the contract period, an addendum to the contract must be agreed and signed. The change/additional deliverables must be in line with the initial scope of the project.

5. Timeline

As mentioned in section 4.

Activity	Time	Days of Work	Responsible	Individuals Involved
<i>What is the specific activity?</i>	<i>When will this activity begin?</i>	<i>How many days of work are required?</i>	<i>Who is responsible for the delivery of this activity?</i>	<i>Who needs to be involved?</i>

Note: At this stage the timeline is indicative and should support any external consultant in the development of their proposal and Inception Report. As part of the process, this timeline should be re-evaluated in consultation between Plan International and the consultant.

6. Budget

Table of Payment Schedule

Milestone	Detail	Amount to be Paid (%)
1. Contract sign		30%
2. Inception report		30%
3. Final report/GESI action plan		40%

7. Expected qualifications of Consultant

Applicants should propose a team comprised of a senior consultant and at least one junior researcher. Teams with gender or other points of diversity are encouraged.

The senior consultant should possess the following qualifications and areas of expertise:

- Advanced degree in gender studies, education, anthropology, development studies, or a related field
- At least five years of research experience with strong reporting or publication history in the field of inclusion/exclusion of marginalized groups in Nepal.
- Demonstrated knowledge and field research experience of marginalized populations in Madhesh province and Karnali province in Nepal.
- Experience of working as a team leader or senior researcher in the field.
- Demonstrated familiarity with policies related to education, gender, and equity and inclusion in Nepal.
- Experience of working with national and international organizations in Nepal.

The junior researcher should possess the following qualifications:

- Master's degree in education, social science or a related field
- At least one year of research experience (including field studies) in the field of inclusion/exclusion of marginalized groups in Nepal.

8. List of documents to be submitted with the Request for Proposal (RFP)

- Detailed response to the RFP/ToR
- Proposed methodology
- Ethics and child safeguarding approaches, including any identified risks and associated mitigation strategies
- Proposed timelines
- CVs
- Example of previous work
- Reference
- Detailed budget, including daily fee rates, expenses, etc.

All consultants/applicant are required to agree and adhere to Plan International's Non-Staff Code of Conduct (Annex)

Depending on the nature of the consultancy you may need to include an NDA (Non-Disclosure Agreement) Clause.

9. Submission of offers

The consultant team should prepare both the “**Technical**” and “**Financial**” proposal and submit the hard copy of document to Plan International Nepal country office by **22 March 2024** with detail plan of action till the event is over.

Sealing and marking of proposals

The Offeror shall seal the proposal in one outer and two inner envelopes, as detailed below.

(a) The outer envelope shall be:

Plan International Nepal, Country Office

Bakhundole, Maitrimarg, Lalitpur

and, marked as: “**Consultancy service for Gender Equality and Social Inclusion Analysis: USAID Equity and Inclusion in Education Activity**”

(b) The 2 inner envelopes shall indicate the name and address of the Offeror and should be clearly marked with “**Technical Proposal**” and “**Financial Proposal**”. In summary, there will be one separate sealed envelope for the Technical Proposal and one separate sealed envelope for the Financial Proposal.

An Offeror having any queries regarding the RFP Document or Scope of Work can send an e-mail to nepal.procurement@plan-international.org. Answers to questions of the Offeror will be sent by email.

***Note:** If an offeror submits the financial proposal (budget) within or in the same envelop as the technical proposal, it will be automatically disqualified.*

10. Evaluation of offers

Shortlisted suppliers may be invited to discuss their proposals in more detail at Plan’s discretion. Plan International, at its sole discretion, will select the successful supplier.

Plan international shall be free to:

- Accept the whole, or part only, of any submission
- Accept none of the proposals
- Republish this Request for Quotations

Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers.

Part of the evaluation process may include a presentation from the supplier.

Value for money is very important to Plan International, as every additional £ saved is money that we can use on our humanitarian and development work throughout the world.

Plan International may award multiple contracts and all contracts will be non-exclusive.

11. Contract & Payment terms

Please note that, if successful, Plan International's standard terms of payment are **30 days** after the end of the month of receipt of invoice, or after acceptance of the Goods/Services/Works, if later.

Payment terms *(Amount of percentage to be paid is standard guideline and should not be change)*

Milestone	Amount to be Paid (%)
1. Contract sign	30%
2. Inception report	30%
3. Final report /GESI action plan	40%

12. Plan International's Ethical & Environmental Statement

The supplier should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation

Child protection is a term used to describe the responsibilities and activities undertaken to prevent or to stop children being abused or ill-treated. It is Plan's duty and responsibility to reduce the risks of abuse to the children who we have contact with and keep them safe from harm. Plan's Child Protection Policy, "Say Yes to keeping children safe", is Plan's overriding framework to protect children who come into contact with Plan employees, volunteers, partner organisations and individuals, including consultants, who are working on behalf of Plan.

The consultant should include statements in the proposal on how he or she will ensure ethics and child protection during the commencement of the assignment and during the field work. The consultant should also specify other ethical protocols to be followed during the due course of the evaluation. The consultant is expected to take consent of the respondents and/or children's guardian before taking photographs and ask if their photographs, verbatim or case stories could be used in report and for public dissemination. Such consent must be documented and submitted to Plan International Nepal along with the final report.

13. Selection Criteria

The following selection criteria will be used for technical evaluation of the proposals.

Evaluation	Criteria	Scoring Weight
Technical Proposal	1. <i>Specific Experience of the consultant(s) relevant to the assignment</i>	15%
	2. <i>Team leader and members relevant academic qualification- and relevant experience</i>	20%
	3. <i>Composition of proposed team in terms of gender/inclusion, sector, relevant experiences and responsibilities</i>	10%
	4. <i>Adequacy of the proposed methodology to the ToR</i>	30%
	5. <i>Data analysis methods, data management and security mechanism well explained</i>	10%
	6. <i>Proposed timeline</i>	10%
	7. <i>Gender transformative approach considered</i>	5%
Technical Proposal		100.00%
Technical Score converted to 100% [(Total+70%) x 100%] (A)		70%
Financial Proposal (B)		30%
Total (A+B)		100%

Gender Responsive Procurement: Plan International defines a gender-responsive business as one that meets criteria for integrating gender equality and women’s empowerment principles in its policies and practices, and which is aligned to international norms and standards. This could be:

- a. *Women-owned business: A legal entity in any field that is more than 51% owned, managed and controlled by one or more women.*
- b. *Women-led business: A legal entity in any field that has a minimum of 50% women representation in management with senior-level, strategic decision-making capabilities.*
- c. *Gender-responsive business: Legal entity that actively promotes gender equality and empowerment of women and young women through their policies and labour practices.*

Evaluation and comparison of proposals

The evaluation team will evaluate and compare the proposals which have been determined to be substantially responsive in accordance to the evaluation criteria.

A two-stage procedure is utilized in evaluating the proposals, with evaluation of the technical proposal being completed prior to any price proposal being opened and compared. The technical proposal is evaluated on the basis of its responsiveness to the Term of Reference (ToR).

Financial proposal will be opened only if they meet the following condition:

- The submission that passed the minimum technical score of 70% of the obtainable score of 100 points in the evaluation of the technical proposals.

In the second stage, the financial proposal of all Offerors, who have attained minimum 70% score in the technical evaluation, will be evaluated. The financial proposal carries a total score of 30%. The points for the financial proposal will be allocated as per the following formula:

$$\frac{\text{Lowest Bid Offered} *}{\text{Bid of the Organization}} \quad \times \quad 30$$

* *“Lowest Bid Offered” refers to the lowest price offered by a proposer scoring at least 70% points in technical evaluation.*

The 70% weightage will be given to the technical proposal (which pass the minimum average Weighted Score of 7) and 30% weightage will be given to the financial proposal. The contract will be awarded to the Offeror scoring the highest combined scores.