



INNOVATIONS FOR SUCCESSFUL SOCIETIES

PROMOTING ACCOUNTABILITY, MONITORING SERVICES: TEXTBOOK PROCUREMENT AND DELIVERY, PHILIPPINES, 2002 – 2005

SYNOPSIS

From 2002 to 2005, Juan Miguel Luz, a senior official at the Department of Education of the Philippines, led a nationwide drive to ensure timely procurement and delivery of textbooks to the country's 40,000 public schools. Before Luz took office, corrupt department officials had awarded textbook contracts to favored, and often unqualified, publishers. Because of weak quality controls, books had poor bindings, printing defects, and missing pages. Without a fixed schedule, publishers sometimes delivered textbooks several months after the start of the school year or failed to deliver them. The entire cycle from procurement to delivery could take as long as two years, twice the specified time span. Soon after taking office, Luz initiated the Textbook Count project to overhaul the procurement and delivery process. He partnered with nongovernmental organizations to monitor the department's bidding process, inspect the quality of textbooks, and track deliveries. Groups such as Government Watch, the National Citizens' Movement for Free Elections, and even the Boy Scouts and Girl Scouts mobilized thousands of volunteers to help track textbook deliveries to public schools. And Coca-Cola Company used its delivery trucks to transport textbooks to schools in far-flung areas of the country. By 2005, textbook prices had fallen by 50%, binding and printing quality had improved, and volunteer observers reported 95% error-free deliveries. The case offers insights into the challenges of monitoring services and holding civil servants and suppliers accountable.

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INTRODUCTION

Looking back on his three years as undersecretary of finance and administration in the Philippines Department of Education, Juan Miguel Luz recalled a 2004 incident in the island province of Masbate. While visiting a remote elementary school, he asked the principal, "When was the last time you got your textbooks?" She

responded, "Two years ago." The principal explained that it took her more than four hours to walk from the school to the department's district office. "The textbooks are in town, but I can't carry them back on foot. No one here has a vehicle. No one here has anything we could use to transport the textbooks from the town," Luz remembered the principal as saying. Transporting

textbooks from district offices to remote elementary schools was just one of the challenges Luz faced during his tenure at the department.

At the time, nearly 500,000 teachers at 40,000 public schools provided free education for more than 18 million students in Philippine elementary and high schools. As the largest government agency, the Department of Education, known as DepEd, was responsible for the selection and procurement of textbooks and for ensuring their timely delivery to all schools. But the mechanism for textbook evaluation, procurement, and delivery was deeply flawed: bidding was handled behind closed doors, textbooks contained errors, and publishers failed to deliver on time or dispatched substantially fewer books than were ordered.

During that time, political events in the country were shaping changes within DepEd. In 2001, protesters ousted Philippine president Joseph Estrada, who had been facing corruption charges. Succeeding Estrada, President Gloria Macapagal Arroyo initiated measures to appease the public and make government more accountable. Soon after assuming office, she appointed Raul Roco, a career politician, as secretary of education. But Roco's team failed to initiate measures that would restructure evaluation, procurement, and delivery of textbooks. Because of political infighting, Roco resigned after 18 months, and Edilberto de Jesús, president of well-regarded Far Eastern University in Manila, took over as secretary.

In October 2002, newly appointed de Jesús selected Luz as undersecretary. Luz came to DepEd with broad experience in both the private and public sector. He had briefly joined President Corazón Aquino (1986–92) as presidential staff director in 1987 before earning a master's degree in public administration from Harvard University's John F. Kennedy School of Government in 1992. From 1993 to 1995, Luz served as associate director of nongovernmental

organization (NGO) Philippine Business for Social Progress before becoming vice president of Far East Bank and Trust Company. He was teaching at the Asian Institute of Management, a graduate school of business and management in Manila, when de Jesús invited him to take over finance and administration at DepEd.

As undersecretary, Luz reformed textbook evaluation, procurement, and delivery. Through a project called Textbook Count, he created transparent bidding procedures, improved the quality of textbooks, and ensured 100% deliveries. Under his leadership from 2002 to 2005, DepEd and its partners in civil society and local communities successfully completed three annual cycles of the Textbook Count project.

This case study provides an example of the monitoring of services and the promoting of accountability in government. It shows how reformers inside government partnered with outside groups to hold suppliers accountable and improve citizens' access to basic services. The Textbook Count project also points out the crucial roles that can be played by NGOs, volunteer organizations, citizens, community members, and private companies to ensure the success of government reform efforts.

THE CHALLENGE

Luz faced three main hurdles in textbook procurement and delivery when he came to DepEd in late 2002. First, he knew he would have to target collusion in procurement between publishers and civil servants. "The old and new procurement laws state that the procuring agency in government must post bid announcements in a newspaper of national circulation," he said. "If agency insiders wanted to collude with a favored supplier, they would publish the smallest possible announcement in the national newspaper with the lowest circulation, in effect hiding the announcement from all bidders save for the favored ones. And they would claim, rightly so,

that they were in compliance with the law. With the procurement details and criteria given to their favored suppliers, on the day of the bidding only the favored ones would show up, effectively making a mockery of the open-bidding rules but not necessarily having done anything illegal or noncompliant with the law.” In another ploy, unscrupulous officials would change bid specifications by issuing a bulletin they shared with only some suppliers. Others could then be easily disqualified for failing to comply with the requirements. Suppliers estimated that payoffs to DepEd officials ate up 20 to 65% of textbook funds.¹

Second, the department had no reliable process for evaluating the quality of textbooks, many of which were riddled with errors involving facts, grammar, and language use. Although DepEd hired outside experts to evaluate manuscripts before awarding contracts, publishers colluded directly with some evaluators and worked to influence others. In a recurring pattern, publishers regularly held conferences at the same time and in the same location as the DepEd held its evaluation sessions. Publishers cheated on the physical quality of textbooks, too. They would use paper of lesser quality than required by contracts, and students often received textbooks with missing pages, unclear print, or loose bindings.

Third, delivery was problematic. Textbook contracts required publishers to deliver textbooks to the public schools. But the publishers’ forwarding companies, which were responsible for the actual shipments, rarely delivered textbooks on time or in the correct numbers. There were frequent reports of ghost deliveries that never reached the schools and of underdeliveries of fewer textbooks than were ordered. “Because there were tens of thousands of deliveries to track among multiple textbook suppliers,” Luz said, “it was possible for a supplier to short the department—in collusion with certain DepEd

insiders. So, for example, instead of a million textbooks, suppliers could print and deliver 500,000. But they could report that they had delivered a million and collect payment for that number. How would we know whether a million textbooks were delivered unless we watched every single delivery?”

In 2001 and 2002, Government Watch, or G-Watch, a social-accountability program of the Ateneo School of Government, a Philippine graduate school for training public servants, conducted a study of 32 school districts. According to G-Watch’s former director Redempto Parafina, the organization found plenty of problems. “First, 40% of the textbooks were not accounted for,” he recalled. “Second, the scheduling of deliveries was messy; there were no clear guidelines on when to deliver and where. Third, the principals were not notified about the deliveries of the books. Fourth, penalties were not imposed whenever there was a late delivery.”

The department did not hold publishers to a delivery schedule, nor did it monitor deliveries as they were being made. As a result, suppliers were free to choose when and where to deliver. In many instances, deliveries were late by more than a year. DepEd inspectors had 30 days to visit schools and check for completed deliveries. Luz said, “Even if they had 30 days to conduct school inspections [for the] textbooks delivered, chances were they couldn’t physically get to all the schools in their assigned areas. And by the time they went and did an actual inspection, the counting or tracking of the number of books delivered was difficult because the books would already have been distributed and used by students. Instead, school principals would give the inspectors their own reports, and the inspectors would sign off on them without even verifying the numbers.” In one instance, DepEd inspectors approved a delivery of just 46,800 of the 108,496 textbooks allocated to a regional office. And 32,625, or more than two-

thirds, of the books that were delivered failed to meet the department's quality guidelines. Three thousand were not part of the purchase order.²

Although the problem had existed through the 1990s, several factors created public pressure for reform in the latter part of the decade. In 1999, journalist Yvonne T. Chua's seminal book about corruption within the department, *Robbed: An Investigation of Corruption in Philippine Education*, spotlighted the severe shortage of textbooks in public schools. The author noted, "The shortage of textbooks in nearly all the 40,000 public schools is so critical that, on an average, one textbook is shared by six pupils in elementary schools and by eight in high schools."³ The same year, in an opinion survey by prominent Philippine research institution Social Weather Stations, respondents rated the Department of Education as the sixth most corrupt⁴ of 26 government agencies.

International agencies such as the World Bank contributed to the timing of the reform. In the wake of the 1997 East Asian financial crisis, the World Bank initiated the First Social Expenditure Management Project, a package of assistance designed to supplement the Philippine government's reduced spending on social services. In 2002, the World Bank approved a loan of US\$100 million under the Second Social Expenditure Management Project. Building on the first project, the second was designed to reduce government costs and promote governance reforms. Providing for basic services in education, health, and social welfare, the loan included funds for the distribution of 37 million textbooks to public schools. The World Bank's guidelines mandated international competitive bidding and created pressures for greater transparency in procurement.

FRAMING A RESPONSE

When he became undersecretary, Luz was well equipped to move quickly. He was familiar

with the inner workings of DepEd because he had led independent assessments of the department while at the Asian Institute of Management. "When we came into DepEd in late 2002, I had the benefit of having headed two study teams that were tasked to look at the Department of Education under former secretary Andrew Gonzales in 2000 and former Secretary Raul Roco in 2002. Because of this, we knew what to look for and we had contacts inside the bureaucracy. In effect, we had both inside knowledge and social capital."

In October 2002, DepEd was on the verge of procuring textbooks for 2002 and 2003. The team that had preceded Luz at the department had focused on operations and had not procured textbooks for 2002. DepEd would be forced to return the money to the Treasury if it did not spend it on textbooks by the end of 2003. Because the department also had to procure books for 2003, Luz faced an unusually high procurement of 37 million textbooks worth 1.3 billion pesos, or about US\$24 million at the time.

Reform of procurement was already a top priority for the new team. A month before taking office, de Jesús, Luz, and two other undersecretaries had started setting priorities for the department. Luz said, "Having come from the private sector and knowing the reputation of DepEd, we were interested in cleaning it up. You could say that it was largely internally driven." The group developed an agenda to improve the quality of education, enhance DepEd operations, and deal with teacher appointments. Procurement reform would play an important role.

Although the new team had decided to work mainly with existing staff, Luz hired procurement consultant and former public school teacher Aida Carpentero, who had a law degree and extensive experience in the private sector. Carpentero later became director of procurement services, handling all of the department's procurement responsibilities.

Luz said, “The instruction given to me by Secretary de Jesús was to make DepEd corruption free and to ensure that 100% of our department funds were used for the right purposes, including classrooms, teachers, furniture, textbooks, and school supplies.” In 2002, as part of that mandate, Luz initiated the Textbook Count project to streamline procurement and delivery of textbooks.

To ensure transparency in procurement, Luz decided to invite independent groups to observe the bidding process. He invited G-Watch and Procurement Watch, an anti-corruption group that tracked government procurement, to attend bid openings and witness deliberations of the department’s Bids and Awards Committee, which evaluated bid proposals. In 2003, a federal procurement law was enacted requiring that government agencies include NGOs in bid openings and contract discussions.

Luz also decided to invite G-Watch and other NGOs to inspect the physical quality of textbooks before the books were shipped to schools. During the second phase of Textbook Count in 2003–04, Luz tackled errors in textbook content by instituting a two-step evaluation process; in 2005’s third phase, he set up a four-step process.

Luz knew that any overhaul of textbook delivery would require setting firm schedules for publishers. He informed staff members of the Instructional Materials Committee Secretariat (IMCS), a unit responsible for gathering enrollment data, evaluating textbooks, and coordinating with schools, that DepEd would put publishers on a common delivery schedule. Luz recalled, “Rather than allow each publisher to draw up their own delivery schedules, . . . we required all the winning publishers to go into a city or province or town on the same dates. Every [publisher would] have the same 150 days from the time of award to the time of final delivery. So we fixed the delivery schedule in such a way that they all go into the same province, city, and town

at the same time.” Such a schedule would keep DepEd informed of the date and time of delivery to specific schools and district offices.

Luz also wanted third-party monitors to verify that schools received quality textbooks and in the right quantities. “We did not want watchers who were DepEd people,” he said. “Suppliers would find it relatively easy to corrupt insiders. Thus, it had to be a group of outsiders or non-DepEd people.”

Luz again turned to G-Watch. Parafina had invited Luz to a public presentation of G-Watch’s 2002 study of 32 school districts. Parafina recalled, “We felt that Luz was the right person to hear of our reform efforts. Not only was he in the right position at DepEd, but he was also a potential ally.” Impressed with G-Watch’s findings, Luz encouraged the group to expand its efforts to monitor all of the country’s 8,000 high schools and districts. He also asked G-Watch to mobilize other national groups, regional NGOs, and local communities.

Parafina agreed to take on the task, even though the size of the task would stretch G-Watch’s staff and resources. “It was an opportunity that we could not pass up,” he said. “This is what we were looking for: a government that would cooperate in monitoring work. And here it was. We could not afford to lose it.” As the project evolved, G-Watch took on the role of central coordinator, effectively communicating with DepEd on one hand and a consortium of NGOs on the other. In later years, G-Watch succeeded in securing small grants from the Partnership for Transparency Fund, an organization that supports anti-corruption efforts, the Asia Foundation, and other groups.

GETTING DOWN TO WORK

Luz started by setting clear standards and expectations for DepEd’s civil servants, often focusing on everyday matters such as prompt meeting attendance. His emphasis on all aspects

of employee behavior had an impact. “When the word got around that we, the new DepEd team, were watching carefully and were firmly acting on things, DepEd employees quickly saw that we were a serious and competent team, and they began to change their behaviors as well—most [of them] willingly, others with a lot of hesitation and foot-dragging. We would use a carrot-and-stick approach depending on the employee group and how intransigent or cooperative they were. Many times, however, sending out signals was sufficient to get staff to change their behavior and attitude toward the reforms.”

Textbook Count 1, 2002/03: Focusing on procurement

Carpentero, director of DepEd’s procurement services in 2011, said, “One area prone to corruption in the department has been procurement. The reform task then was to design and develop a set of finance and administration reforms that would professionalize the bureaucracy and provide for systems, structures, and processes that could be carried out daily. That started with a big textbook procurement in 2002/03.”

During the first Textbook Count project, Luz took steps to open up the procurement process. As a first step, DepEd staff began to disseminate bid specifications widely by advertising in three major national newspapers and publicizing the news on radio. Luz expanded the bidding, which had been restricted to Philippine companies, to international publishers in compliance with World Bank guidelines. “When you are an international company, you are often not privy to the insider relationships at DepEd,” Luz said. “Hence, their pricing tended to be lower than the old-time bidders.” As applicants from Singapore, South Korea, and Thailand joined the bidding, quoted prices fell sharply. Companies put in bids at 35 to 36 pesos

for each textbook—less than half the 2001 average price of 90 pesos.

When bids were opened in November 2002, Luz set up the room in a way that made it easy for attendees to observe the proceedings. He also had the entire event videotaped. Members of the Bids and Awards Committee, opened bid applications, sat at a table in the front of the room. NGO observers, publishers’ representatives, World Bank officials, and other attendees sat in a separate section. Publishers were allowed to ask or answer questions but were not allowed near the committee table.

After the committee verified an applicant’s documents, a committee member would announce the bidder’s quoted price. A DepEd official noted the amount on paper, and another typed the number into an electronic spreadsheet. The publisher then signed the paper, making the quote official. At the end of the day, the DepEd team distributed copies of the spreadsheet to the 40 publishers and other participants so that quotes could not be modified later. Luz also encouraged NGO observers to attend the deliberations of the Bids and Awards Committee while the committee decided on the winning proposals. NGOs continued to track the awarding of contracts a few months later.

Before awarding contracts, Luz also tackled problems related to the evaluation of textbook content. The IMCS, in charge of textbook evaluations, used a single-level process for checking content. The staff routinely contracted subject and language specialists to evaluate textbooks during a two- or three-day retreat. IMCS then passed along the evaluators’ conclusions and recommendations to the Bids and Awards Committee, which used the information in evaluating bids. Luz said, “I had heard that in the past, publishers would find ways to turn up at places where the evaluation of textbooks was being held.” Publishers would try to influence the

evaluators at the retreat venue. Well aware of the problem, Luz instructed IMCS to hold the retreat in a remote location. He also invited NGO observers to the retreat.

Enhancing the delivery process

With the help of the procurement and IMCS teams, Luz worked out a detailed schedule for deliveries to high schools and district offices. “We had to make all deliveries predictable,” Luz said. “So, we put together a common delivery schedule for all publisher-suppliers. In this way, we could finish a complete textbook procurement cycle in 10 months, not 20. Since textbook procurement is a large procurement and is done every year, when you keep the annual cycles separate, then the end users [schools and students] know what to expect. That is, they would get new textbooks at a certain time of the year. If the cycles overlap, then it becomes easy to hide certain anomalies in the procurement process and confuse end users on the extent of the actual procurement and number of textbooks due to them.”

Luz and his team divided the country into four zones—Visayas; south of Metro Manila and Metro Manila; north of Metro Manila; and Mindanao—and outlined a schedule for every province within each zone. Publishers were given three to five days to deliver to a province and three days to deliver to a city. They could not deliver before or after the dates assigned to a province or city within a zone. Luz said, “The reason was that we wanted to put watchers in every school. But if we recruited volunteers to watch deliveries for us, we had to notify them of the number and title of books they would be receiving, the names of the suppliers, and the delivery dates. All of this was necessary if we wanted parents, community members, or NGO workers to stand by and wait for deliveries in their own schools.”

In early 2003, after the Bids and Awards Committee had selected six consortia of publishers but before the contracts had been

completed, Luz presented the delivery schedule to the winning publishers and informed them that their forwarding companies had to deliver textbooks from June through October.

The publishers resisted Luz’s proposal, and some of them threatened to take the department to court. Carpentero recalled the meeting: “The real challenge that we met there was when the suppliers resented the streamlining of deliveries.” Luz, however, insisted that the deliveries be made according to the schedule. He argued that the NGO monitors, in charge of verifying deliveries, could not wait indefinitely to receive them. He also assured publishers that payments would be processed faster under the new system. Unlike department inspectors who took time to verify deliveries, monitors would immediately sign receipts if forwarders delivered the correct quantity and quality of textbooks. DepEd would accept the signatures as proof of delivery and expedite payments. Carpentero said that the incentive of faster payments swayed the publishers, who eventually agreed to adhere to the schedule.

Enlisting outside help

Recruiting volunteers for monitoring of deliveries was next on Luz’s reform plan. As G-Watch’s Parafina reached out to a number of NGOs, Luz proposed that they approach the National Citizens’ Movement for Free Elections, or Namfrel, an election watchdog that had a large network of volunteers. Established in 1983, Namfrel’s 103 chapters and 500,000 volunteers were in each of the country’s 80 provinces. Because public schools in the Philippines are polling venues and teachers serve as poll workers, Namfrel volunteers had working relationships with teachers or officials in most schools.

In March 2003, Luz approached Namfrel executive director Telibert Laoc to enlist Namfrel’s involvement in Textbook Count. Laoc recalled, “Luz knew our basic strength was

essentially our network, and he reached out to us.” Although Laoc supported the textbook project, he had to persuade leaders of Namfrel’s chapters to participate in an effort that had no direct connection with elections. In a letter titled “My Books, My Future,” he outlined the importance of the book project and appealed for support. Sixty-one Namfrel chapters signed up.

Along with Namfrel, G-Watch partnered with seven other regional and local groups to form a consortium of NGOs for the first round of Textbook Count.

After building this coalition of support, Luz publicized the Textbook Count project and DepEd’s partners. His staff also put out radio messages to notify communities and schools that they would be receiving textbooks soon. DepEd advertised the delivery schedule in 60 national, local, and community newspapers. In letters to public schools, IMCS staff detailed delivery dates, textbook titles, and the numbers of textbooks the schools would receive. Luz recalled, “In the end, we sent out over 5,500 letters to 3,500 high schools and 2,000 district offices.”

Clarifying roles

In May 2003, Parafina and the Namfrel team drafted the duties and responsibilities of textbook monitors. Parafina said, “We benefited from Namfrel’s expertise because they knew how to operate on the ground.” Monitors were to inspect the quantity and physical quality of the textbooks but not check the books for content. They could not reject a delivery even if the textbooks were of poor quality. After inspecting the shipment, they would sign an Inspection and Acceptance Report, noting any errors or discrepancies.

The reports became an important element of the process. Misunderstandings and disputes were reduced because every significant participant received a copy. After monitors and school officials signed a report, the forwarder kept the

original copy, and a school official and a volunteer monitor each kept a copy. Schools sent the last copy to the DepEd national office. Parafina said the report “acted as an incentive for the supplier or forwarder to make sure there was a monitor present to sign, because it ensured faster payment from DepEd.”

G-Watch sent detailed instructions to volunteers before the start of the deliveries. Parafina coordinated with both DepEd and Namfrel’s central office to mail documents to volunteers. Each package contained descriptions of monitor duties, the schedule for delivery, an Inspection and Acceptance Report for signing, and identification documents for volunteers. Parafina said, “Our assumption was that Namfrel chapter coordinators would choose the people to assign in one or more schools. It was up to them to distribute the documents to their people.”

Conducting warehouse inspections

With volunteers in place, G-Watch coordinated warehouse inspections with DepEd as the textbooks were getting printed and bundled. Department officials, G-Watch, Namfrel, and community volunteers inspected the textbooks’ physical quality. Volunteers checked for misprints, double prints, blank pages, and missing pages. DepEd asked publishers to rectify before making deliveries any defects detected.

Luz recalled, “G-Watch was very strict. Once I got a call from a publisher who was almost in tears. The company had already printed 100,000 textbooks that were ready for delivery to a particular region, when the inspection team came to their plant to examine the books. Because they had rushed the binding of the books, these fell apart when the inspection team started to open bundles of books and leaf through the pages. As they opened more and more boxes of books, the floor of the warehouse began to fill with pages that had fallen out of the books. Needless to say,

the entire lot was rejected.” The publisher eventually repaired the textbook bindings before shipment.

Training and communicating

In May and June 2003, G-Watch organized briefing orientations for Namfrel chapter heads and other NGO partners. DepEd officials and Parafina ran two sessions to brief volunteers and school authorities on the project and to train them in monitoring and reporting. Chapter leaders had the job of distributing the information to local volunteers. Parafina recalled that he wanted uncomplicated procedures: “We said from the start that the process [for volunteers] had to be simple—so simple that they would be able to do it if they just read the instructions.”

Parafina asked Namfrel volunteers to report completed deliveries to their national coordinators by phone or text messages and by written statements. Namfrel monitors would also submit copies of the Inspection and Acceptance Report to their chapter heads. The chapters would collect receipts from all of the schools in their areas and send them to Namfrel’s central office. G-Watch would then collect the receipts and share the results with DepEd.

Lines of communication were carefully arranged. Anticipating delays in delivery, G-Watch provided Namfrel with the phone numbers of the forwarding companies. Namfrel’s team in Manila then sent the information to volunteers so that the volunteers could coordinate directly with the forwarder assigned to their area. DepEd’s IMCS team also sent forwarders’ phone numbers to school officials. Socorro Pilor, director of IMCS, said, “We had open communication lines with all stakeholders.”

Monitoring delivery

In June 2003, forwarders started delivering textbooks to public schools in Visayas, the smallest of the four zones and the first to receive

deliveries. After the deliveries, DepEd officials, publishers, forwarders, and NGO monitors assembled to evaluate the first round. Using data from the Inspection and Acceptance Reports, DepEd and G-Watch staff found that 14% of the deliveries were deficient. Monitors had reported missing pages or loose bindings, noted cases of fewer textbooks than expected, and identified wrong textbooks. Luz said, “Our messages to publishers were that we are watching them and their deliveries and that it was not acceptable when 14% of these were deficient in one way or another or full of delivery errors.” By the time forwarders delivered to zone four, delivery errors were down to 5.5% in that zone, according to Luz.

Coordination problems arose during deliveries. In many cases, monitors would not be present either (1) when deliveries were late, or (2) after school hours, or (3) on weekends. Sometimes forwarders informed IMCS that monitors or school authorities were not present at the time of delivery. IMCS resolved issues with school authorities, and G-Watch intervened when monitors were involved. Parafina said, “We had decided on minimal intervention, and there was no systematic plan for handling issues. . . . We just waited for the next thing to happen and reacted only when an issue surfaced.”

In some schools, the principals were suspicious of the monitors and resented their presence. Pilor said, “At the initial implementation of the project, some school principals, who felt that their performance was being monitored, were reluctant to involve civil society organization volunteers in the inspection of the deliveries.” In these cases, IMCS assured school authorities that monitors were present only to assess the performance of the textbook suppliers. (During Textbook Count 2, the resistance of school authorities diminished as they became familiar with the project.)

Measuring results

By November 2003, G-Watch and Namfrel had successfully mobilized field monitors in 65% of the 5,613 delivery sites. These included 3,532 high schools and 2,081 district offices.

In March 2004, staff from DepEd and G-Watch jointly conducted an evaluation of the project. At the meeting, monitors offered recommendations on streamlining the process for the next round of deliveries. The DepEd and G-Watch team noted that the cost of textbooks had declined by nearly 60%, that volunteers had inspected about 10% of textbooks in warehouses, and that the entire cycle, from procurement to delivery, had been completed within 12 months. The project was a success. “Our metrics were simple,” Luz said. “For us, the measure of success was 100% deliveries to the schools or school districts of textbooks of the quality that we had agreed upon: the right number of textbooks; the right titles; the right weight and quality of paper; clean, neat printing; and quality, sturdy bindings. All of those requirements had to be met, or shipments were rejected. And whatever was not met was rectified at the publisher’s cost.”

Textbook Count 2, 2003/04: Polishing the system

In November 2003, DepEd started procurement for the next academic year. Based on enrollment data and a 10% buffer, IMCS requested 14 million textbooks worth 660 million pesos, or about US\$12 million.

Because of the 2003 procurement law, more NGOs monitored DepEd’s bidding process. G-Watch, by now firmly in the position of central coordinator, worked with Procurement Watch, one of the leading procurement watchdog groups in the Philippines, to educate new volunteers about the law and train them in observing the bidding process effectively.

In this second phase of Textbook Count, Luz paid special attention to content evaluation. “We wanted to structure textbook content evaluation so

that it would be multitiered,” he said. “No one evaluator could be in more than one tier of evaluation.” Luz initiated a two-step evaluation in which one group of specialists determined whether the manuscripts corresponded to IMCS curriculum guidelines and a second group checked for accuracy of content and language.

There were changes on the delivery side, too. Namfrel chapter leaders could not take the lead in mobilizing field monitors because of election duties in 2004. Therefore, Parafina decided to approach the Boy Scouts and the Girl Scouts to monitor deliveries. A former scout himself, Parafina actively recruited Boy Scouts and was familiar with the organization’s national leadership. With 115 local councils and 1.6 million members, Boy Scouts were students in almost every school. The Girl Scouts’ 96 chapters had more than a million members. Luz said, “The idea of involving the Boy Scouts and Girl Scouts was pure genius on the part of Parafina of G-Watch, and it worked out extremely well for DepEd. . . . Unlike adult volunteers, they did not have to take time off work to go to the schools. They were students already in the schools. All we asked them to do was to wear their scout uniforms on the scheduled delivery dates so that the school knew who to pull out of class to monitor the deliveries.”

Both scout organizations agreed to join Textbook Count 2. Nixon Canlapan, communications director of Boy Scouts of the Philippines, said, “Parafina came to me in 2004 to invite us to be part of the project. We saw this as an opportunity for the Boy Scouts to serve, gain visibility, and become part of an anti-corruption project.”

Maria Dolores Santiago, executive director of the Girl Scouts of the Philippines, agreed. “Most of our girls are from public schools, and we wanted our girls to get the books and benefit from the project,” she said. “DepEd is our ally, and we are committed to supporting their projects where

our help is needed. Involving our girls and adult leaders in the Textbook Count project was part of our community service.”

To facilitate coordination, Parafina divided the country into two zones, assigning one to the Boy Scouts and the other to the Girl Scouts. Although no longer in the lead role, 60 Namfrel chapters helped mobilize local volunteers.

Parafina also recruited smaller, regional and local groups. “We had to make sure that all points were covered,” he said. “I tried to recruit others. I already knew the extent of the work that would be required. So, I would get the details, look at the timeline, and set meetings with all those that wanted to be involved.” By mid-2004, G-Watch had assembled a coalition of 18 NGOs, including the Parent-Teacher-Community Association, a decentralized network of parents and community members; rotary clubs; religious organizations; and local groups such as the Concerned Citizens of Abra for Good Governance.

There were minimal changes in the delivery process. Parafina said, “In the second iteration of the project, we just repeated what we did in the first round, with some improvements.” Once again, DepEd and G-Watch conducted warehouse inspections, trained monitors, provided them with relevant documents, handled delivery problems, and held a final evaluation.

By November 2004, G-Watch, the Boy Scouts, the Girl Scouts, and Namfrel had successfully mobilized 8,000 field monitors in 85% of the 7,656 delivery sites. During the subsequent evaluation, DepEd and its partners concluded that they had successfully procured 14 million textbooks at 47 pesos each. NGOs had assisted DepEd in all of the 21 inspections during the textbook production stage.⁵ With publishers rectifying reported errors in deliveries, DepEd recorded 100% distribution to high schools and district offices within 12 months.

Textbook Count 3, 2004/05: Focusing on content

In November 2004, DepEd started a third round of procurement for 1.2 million textbooks valued at 55 million pesos, or about US\$1 million. Procurement and delivery monitoring followed the pattern of the first two Textbook Count projects, but Luz refined content evaluation further. He said, “A two-step evaluation dealt with the collusion angle, but a four-step one really worked on the quality.” In the four-step process, subject-matter specialists evaluated the curriculum according to IMCS guidelines; university professors checked facts, concepts, and data; classroom teachers inspected the presentation of the material; and language experts reviewed English or Filipino grammar.

By November 2005, the Boy Scouts, the Girl Scouts, and other groups had monitored 4,844 delivery sites, or 65% of all deliveries. DepEd had successfully procured 1.2 million textbooks at 46 pesos each. G-Watch had mobilized 6,000 volunteers from 34 different organizations. NGOs had assisted DepEd in 19 of 25 inspections and checked 165,023 textbooks, or 13% of total shipments.⁶ DepEd again recorded 100% distribution to delivery sites within 12 months.

OVERCOMING OBSTACLES

Although publishers delivered directly to *high schools* in accessible and urban areas, they did not find it cost-effective to deliver to each of the country’s nearly 37,000 *elementary schools*, many of which were located in remote, hard-to-reach locations. Therefore, forwarders delivered textbooks to district offices, which were then responsible for distributing the textbooks to elementary schools.

In 2004, Luz heard about elementary schools that had not received their allotted shares of textbooks even though DepEd records showed that forwarders had delivered the correct numbers

of textbooks to district offices. DepEd inspectors looking into the discrepancy found many of the missing textbooks in district office storerooms. School principals or teachers, reluctant to incur personal travel costs, had never picked up the textbooks; and district officers had failed to arrange for deliveries. Luz recalled, “District officials would say, ‘Well, the schools are very far away. They are on an island or on top of a mountain or across the river. We have told the elementary schools to collect their textbooks, but if they don’t, we also don’t have the resources to bring their textbooks to them.’”

In August 2004, when visiting the remote elementary school in Masbate province, Luz discovered that the school had not received textbooks in two years. No one in the vicinity had a vehicle to help the principal bring textbooks from the district office. Luz recalled, “In the middle of our conversation, a red truck drove by. It was a Coca-Cola truck. I asked the principal, ‘How often does this truck come by?’ ‘Maybe every month,’ she said.”

Luz realized that, with its extensive distribution network, Coca-Cola Company could easily transport textbooks from district offices to elementary schools in difficult or remote locations. As soon as he returned to Manila, he contacted Maria Cecilia Alcantara, president of the Coca-Cola Foundation, the company’s philanthropic arm. In subsequent discussions, Coca-Cola’s regional distribution heads agreed to use their trucks to deliver textbooks to elementary schools. Alcantara said, “It did not cost us any more, and we were very willing to partner with government agencies like DepEd.”

The partnership worked well. During Textbook Count 3, Luz provided Alcantara with a list of district offices that needed textbooks transferred to elementary schools under their jurisdictions. Coca-Cola’s operations team selected 445 districts along its distribution routes, and over the course of a few months, DepEd

officials notified the company when textbooks were ready to be picked up from district offices. Coca-Cola’s operations team, in turn, would add a pickup notice to an internal delivery schedule. Alcantara said, “It was just a matter of informing us that the books were ready to go at any time we were ready. At the next available opportunity, our truck drivers would pick them up and bring them to the schools.”

At the completion of Textbook Count 3, the company reported 100% distribution in the 445 districts.⁷

ASSESSING RESULTS

In October 2005, President Arroyo transferred Luz to the Department of Labor and Employment. The transfer was initiated for political reasons unrelated to the Textbook Count project, and Luz resigned from government about seven months later. In his resignation letter to the president, he cited his work at DepEd as “the most important and fulfilling” experience of his professional life.⁸

Under Luz’s leadership, Textbook Count had run successfully for three years, providing 53 million textbooks for 18 million public school students. The average price of textbooks had fallen by more than half, to 37 pesos in 2003 from 90 pesos in 2001.⁹ The average price had risen to 46 pesos by 2005 because of the addition of supplementary lesson guides and teacher manuals. Over the three years, however, overall prices had fallen by 50%.¹⁰ DepEd’s frequent warehouse inspections had improved the quality of printing and binding. Publishers had raised the quality of their book paper to the standard 70 grams per square meter from 54 grams.¹¹ And DepEd reported that the average shelf life of textbooks had risen to four or five years by 2007 from two years prior to 2002. The time for a complete textbook cycle, from bidding to delivery, had shrunk by 50% to 12 months. G-Watch reported 95% accurate deliveries on average by the end of

2003.¹² Publishers were correcting errors reported by monitors, leading to a 100% success rate in textbook delivery by the end of Textbook Count 3. And DepEd's serious reform efforts and its partnership with NGOs had created a transparency that bolstered all steps of the process.

Based on IMCS data from public schools, Carpentero said every student had a book in the four main subjects of English, mathematics, science, and social studies. The student-to-book ratio also improved in other subjects, although students still shared textbooks in some schools. The involvement of the Boy Scouts and the Girl Scouts deepened and broadened the reform effort. By taking part in the project, students shared responsibility for the textbooks they used. Parafina of G-Watch noted that local communities and parents also became involved. Although publishing and scheduling delays prevented Coca-Cola from participating in 2006, its participation had had an impact. Alcantara of the Coca-Cola Foundation said, "For us, it was not really promoting Coke but saying to the private sector that you can use your resources in a different way to help."

Other groups adopted the Textbook Count model. Namfrel used a similar system to monitor supplies procured by the Department of Health. G-Watch used the same model to monitor school construction projects. Some groups applied similar strategies to track procurements in the Department of Public Works.

The Textbook Count project had glitches, however: Printing delays or natural events such as flash floods or heavy rains prevented suppliers from delivering according to the schedule. Or local volunteers turned up to receive textbooks that never arrived. In some instances, volunteers were unavailable to receive rescheduled shipments, and forwarders delivered the textbooks without getting signatures from monitors. In others, on-site quality inspections did not completely prevent publishers from shipping textbooks with defects.

This was especially true of international suppliers, which were not subjected to the checks before shipment.

After Luz's departure, Textbook Count 4 and 5 projects continued in 2006 and 2007. Parafina said, "We were devastated when Luz left. He was really our anchor within DepEd." But G-Watch had established a solid working relationship with the middle managers in the department and lobbied them to continue the project. "We thought that this is proof that the essential infrastructure is there," Parafina said. "Luz was really able to introduce something that could stand on its own. We were able to continue, at least into the next round."

In Textbook Count 5, the role of NGOs diminished. IMCS directly mobilized volunteers, and G-Watch played a smaller role. Parafina said, "I think Textbook Count 5 was unable to retain the core features of the previous years such as diligent coordination, dispatching documents to volunteers, and briefing orientations." The reduced role of NGOs coincided with their concerns about continuing to monitor deliveries. Parafina said, "We were saying, 'Are we going to do it forever?'" Because of limited resources, G-Watch knew it could not sustain the project. It was also branching off into other monitoring projects. Parafina started discussions on transferring Textbook Count to the Boy Scouts and Girl Scouts but did not get far with his proposal.

IMCS officials asserted that the project had become a permanent part of DepEd. After 2007, the department had procured textbooks only for the smaller number of high schools. IMCS had, therefore, directly coordinated with school officials and such groups as the Boy and Girl Scouts to monitor deliveries. In 2011, Pilor of IMCS said, "The partnership between them [NGOs] and DepEd is official and the roles are defined. . . . We will revitalize the civil society organizations' involvement" in big deliveries.

Carpentero noted that, although there were no reports of missed deliveries or underdeliveries, one problem had returned. She said, “We have gone back to the previous practice that suppliers deliver on their own time and schedules. . . . They have broken away from the discipline that had been in place for some time and from the norm we set.”

The procurement reforms remained in place, however. In 2007, in keeping with the 2003 procurement law, DepEd approved an order to institutionalize NGO participation in procurement. Carpentero said, “I would say that procurement reform remains constant and has been institutionalized.” NGOs continued to monitor the department’s bidding process, including processes for textbook procurement.

REFLECTIONS

In 2011, Juan Miguel Luz reflected on institutionalizing reforms within the Department of Education, or DepEd: “Political appointees in the Philippines usually have short and unpredictable term limits. . . . The leadership in DepEd changes too often, too soon. By the time the new people come in and learn the ropes, their terms are up. From 1986 through 2010, the average stay of an appointed DepEd secretary was around 24 months. Why did it work for us? We had the opportunity to have done two commissioned studies on the department of education in early 2000 and mid-2002. We knew what to look for.” He added, “If you have strong champions inside the central office and outside in the field, in the schools or divisions, then you know that the reforms have a good chance of continuing. But once those champions are out of office, there is no guarantee that the next leader will continue the reforms or change them. The challenge to institutionalizing reforms remains the largest and most difficult challenge for the entire Philippine bureaucracy, not just DepEd.”

Redempto Parafina, former director of Government Watch, observed that Textbook Count had ushered in a new kind of engagement for nongovernmental organizations (NGOs). “Textbook Count was a unique intervention in which civil society’s engagement was not limited to advocacy,” he said. “It was different because we had to do something. That is, we needed to monitor. We had to trust DepEd, and they had to do the same. The project started another type of engagement between the government and civil society.”

The project’s impact extended beyond government officials and NGO activists. Maria Dolores Santiago, executive director of the Girl Scouts of the Philippines, said simply, “The girls were proud to be part of the project.”

EPILOGUE

From 2007 to 2012, DepEd collaborated with civic groups to find additional ways to improve textbook delivery. Some of the innovations adopted earlier were not sustained.

Textbook Walk

In April 2007, G-Watch and DepEd initiated Textbook Walk, an annual event designed to supplement the Textbook Count and help move books from district offices to elementary schools.

Community volunteers, parents, teachers, and school officials in 12 districts organized a fiesta to highlight the importance of schoolbooks for children’s performance.¹³ Parafina said, “We wrote to the same partners—Namfrel, Boy Scouts, and Girl Scouts—and asked them to join. But we let them plan events on their own. It was a joint effort of the community.” About seven schools attended the celebration in each district. “Textbook Walk capitalized on the Filipino flair for festivities,” Parafina noted. The celebrations included song and dance—even poems.

Volunteers, teachers and school officials then carried textbooks from the district office to elementary schools on foot, or via motorcycles, tricycles, boats, and wooden carts. In some areas, they formed human assembly lines to transport textbooks.

Through the Textbook Walk project, G-Watch estimated that volunteers transported 60,000 textbooks worth 2.5 million pesos (about US\$48,000) to 110 elementary schools in 2007.¹⁴ Parafina said, “The project was very successful because in one day we were able to dispatch all the books to the elementary schools. Plus, there was community awareness and participation.” The Department of Education continued the project in subsequent years, encouraging local communities and school officials to hold Textbook Walks, organize volunteers, and transport textbooks to elementary schools.

At the same time, the centralized coordination of Textbook Count through partners such as G-Watch lessened. Joy Acheron, director of G-Watch, noted that the organization started decreasing its involvement in the project from 2007/08 onward, turning over its coordination to DepEd. She said, “We thought G-Watch’s coordination of projects such as Textbook Count could not be perpetual.” With G-Watch’s reduced role, civil society organizations did not collaborate and monitor deliveries to the extent that they had from 2002 to 2007. And because of limited resources and other priorities, no central civil society partner emerged to assume day-to-day management of the program.

But civil society organizations experimented with creative solutions to sustain the Textbook Count’s community monitoring aspect. For instance, Joy Acheron, director of G-Watch, said, “We are setting up local hubs that will replicate the kind of coordination at the national level that we did earlier. We thought that if we can pass this coordination down to the local intermediary level and if ownership can be built at that level and if

more groups are doing that, it can sustain community-based action.”

Despite these adjustments and the secretariat’s claim to have mainstreamed or institutionalized Textbook Count as part of its normal operations, information on deliveries did not flow from the central office to districts, schools, and civic groups—or vice-versa—as well as it had in the past, although it persisted in some areas.

Book Procurement, 2011/12

From 2009 to 2011, DepEd procured another 37 million textbooks at a cost of 1.3 billion pesos for the 2011/12 school year. Because of changes in top management, time constraints, and devastating typhoons, the department was unable to follow the international competitive bidding practices of 2002 to 2005. DepEd was already running behind schedule and if it had not moved quickly, it would have lost the money earmarked for procurement. With Secretary Armin Luistro’s approval, the department of procurement services contracted directly with selected publishers to renew copyrights and reprint titles.

The decision set a poor precedent. Although legally defensible, direct contracting went against international procurement best practice norms as well as the department’s own 2004 Textbook Policy that required DepEd to purchase textbooks through competitive bidding.¹⁵ (Department officials noted that the 18 titles up for renewal preceded the 2004 policy.) Civil society organizations that monitored the department’s procurement activities expressed reservations but ultimately went along with DepEd’s decision.

Textbook delivery, 2011/12

On the delivery side, some aspects of Textbook Counts 1 to 5 remained intact, according to Director Pilor of the Instructional Materials Committee Secretariat, the unit that

oversaw textbook deliveries. The department held an orientation workshop for school property custodians, who were also responsible for tracking the book deliveries earmarked for their schools. (Civil society monitors no longer fully participated in the workshop as in previous delivery cycles.) At the orientation, secretariat officials instructed the custodians to contact DepEd's text messaging hotline—established in 2005—to report problems during deliveries. Similarly, department officials urged publishers to use the hotline to report issues, and they promised prompt resolutions.

The department adhered to past practices to ensure that textbook deliveries took place according to plan. It advertised delivery schedules in national, regional, and local newspapers and sent formal letters to inform district offices about textbook allocations and delivery dates.

For reporting deliveries and making payments, the instructional materials secretariat required school superintendents to verify the receipt of expected numbers of books before processing payments. Pilor said, "We require the school superintendents to issue a final acceptance report certifying that the whole division receives this [expected] quantity of textbooks. Unless we receive this, the payment of publishers will not be processed." Local monitors from parent-teacher associations or other local organizations still signed off on a copy of the Inspection and Acceptance Report as in the past. But the collection of receipts and the reporting were not centralized under a parent civil society organization, such as G-Watch.

Furthermore, in addition to collecting and analyzing signed receipts, the department audited schools to ensure that they had received the right textbooks, said Pilor.

The involvement of mayors and local government units, local administration below the regional level, and parent-teacher associations added a new dimension to textbook deliveries in districts. DepEd's instructional materials

secretariat encouraged civic and religious organizations in local communities to mobilize on their own and help with deliveries. That development, too, represented a break from the past practice of G-Watch's centralized and tight coordination of all deliveries.

Assessment of the 2011/12 deliveries

Director Pilor said the 2011/12 deliveries to district offices had progressed smoothly. Publishers delivered books safely to district headquarters, which in turn were responsible for deliveries to elementary and high schools. Volunteers from parent-teacher associations, local government units, community-based organizations, and the Boy Scouts monitored district deliveries and signed off on receipts, as in the past. The secretariat received no complaints of short deliveries to district offices.

Civil society groups and the department disagreed about whether DepEd had met its goal of 1:1 textbook-to-student ratio for science, mathematics, English, Filipino, and history textbooks in 2011/12. Pilor said the department had supplied the target 1:1 ratio to district offices, but suggested that shortfalls at elementary schools sometimes happened because not all textbooks had made their way from the district to the schools. The Coca Cola partnership had not continued and many communities were not always successful in mobilizing volunteers to transport the books through Textbook Walks or other means. Pilor agreed that the "district-to-schools delivery is still a work in progress." But civic groups noted other reasons as well. They said that many schools did not meet the 1:1 textbook-to-student ratio because school officials sometimes reported inaccurate information about the number of books they might need for the academic year. The groups also argued that DepEd did not really have a foolproof system for collecting basic data to assess how many books reached elementary schools.

As part of a related monitoring effort, the Affiliated Network for Social Accountability in East Asia and the Pacific (ANSA-EAP) collaborated with DepEd to launch the checkmyschool.org site in 2011. This new web portal enabled parents, students, and educators in about 8,000 elementary and high schools to report missing textbooks or school furniture, teacher absenteeism, or misuse of funds. The site also included information on enrollment, teaching personnel, and test performance or proficiency ratings.

Pilor noted that checkmyschool.org became a part of DepEd's monitoring system, in the absence of the G-Watch-sponsored Textbook Count. She explained, "They [ANSA-EAP] monitor some schools and present us with findings." However, the system did not deliver sufficient information to substitute effectively for the earlier count process.

Observers noted that DepEd's leadership was also focused on other pressing priorities, and not Textbook Count. The project did not enjoy as much support from top management as during the time of former secretary Luz, who served from

2002 to 2005, because the new team had turned its attention to school infrastructure. A series of hurricanes in 2009–11 had destroyed a large number of schools, and the country suffered from a backlog of 60,000 classrooms. DepEd aimed to close the gap in the number of classrooms by the end of 2013 and focused its efforts on that goal.

In early 2013, DepEd continued to find ways to embed monitoring of textbook deliveries in its normal operations. The instructional materials secretariat worked with school authorities to streamline the process and encouraged civic groups and local communities to mobilize. However, monitoring activities and reporting were not as systematic as in the past for the reasons noted earlier. Although civil society organizations remained committed to ensuring that textbooks reached schools, they had to consider the burden on their own limited resources. The success of future deliveries would therefore rest on the actions of both DepEd and communities that receive textbooks.

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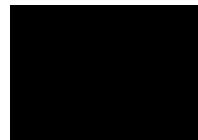
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