

**PHILIPPINE INSTITUTE FOR DEVELOPMENT STUDIES**

# **PART I**

## **Survey Firm for Tracer Study of 4Ps Beneficiaries**

**REQUEST FOR EXPRESSION OF INTEREST NO.  
2024-126**

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# ***Checklist of Eligibility Requirements***

1. Eligibility documents Submission Form (Annex A)

## **Class “A” Documents**

### **Legal Documents**

2. Certificate of PhilGEPS Registration under Platinum Membership

### **Technical Documents**

3. Statement of Consultant’s Nationality (Annex B)
  - Notarized Authority
4. Curriculum Vitae for the Proposed Professional Staff (Annex C)
5. Statement of Completed Contracts (Annex D)
6. Certificate of Good Standing, Acceptance Report, Certificate of Satisfactory Service Rendered, or Any Proof of Satisfactory Completion of Completed Contracts
7. Statement of Ongoing and Awarded but Not Yet Started Contracts (Annex E)

### **Financial Documents**

8. Latest Audited Financial Statements (stamped received by BIR)

## **Class “B” Document**

9. Valid Joint Venture Agreement (JVA) if JV is in existence or duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful.

## ***Section I. Request for Expression of Interest***

## REQUEST FOR EXPRESSION OF INTEREST

### Survey Firm for Tracer Study of 4Ps Beneficiaries

REI No. 2024-126

1. The **Philippine Institute for Development Studies (PIDS)** intends to apply the sum of **Nine Million Nine Hundred Thousand Pesos (PhP9,900,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for the **Survey Firm for Tracer Study of 4Ps Beneficiaries**.
2. The PIDS Bids and Awards Committee now calls for the submission of eligibility documents for the **Survey Firm for Tracer Study of 4Ps Beneficiaries**. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before **October 24, 2024 (10:00AM)** at the address below. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.
3. Interested bidders may obtain further information from the PIDS – BAC Secretariat c/o Procurement Management Division or via email at [procurement@pids.gov.ph](mailto:procurement@pids.gov.ph), and secure the Bidding Documents at the address given below during Mondays to Thursdays, 9:00 a.m. to 5:00 p.m.
4. A complete set of Bidding Documents – Part I may be acquired starting on **October 17, 2024** by interested Bidders from the address below. It may also be downloaded *free of charge* from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the PIDS (<https://www.pids.gov.ph>).

Short Listed Consultants may only be allowed to drop their Technical and Financial Proposals upon payment of the applicable bidding documents fee, pursuant to the latest Guidelines issued by the GPPB, in the amount of **Nine Thousand Nine Hundred Pesos (PhP9,900.00)**.

5. Opening of Eligibility Documents shall be on **October 24, 2024 (1:30 PM)** at the given address below and/or via **videoconferencing**. Eligibility Documents shall be opened in the presence of the bidders’ representatives who choose to attend the activity. Late submissions shall not be accepted.
6. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR). The short list shall consist of **three (3)** prospective bidders who will be entitled to submit Technical and Financial proposals/bids. The criteria and rating system for short listing are:

- (i) Applicable/Relevant Experience of Consulting Firm - **40%**;
  - (ii) Qualification of Key Personnel – **40%**; and,
  - (iii) Current workload of the Firm - **20%**.
7. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the IRR of RA 9184. Bidding is restricted to Filipino citizens/sole proprietorships, cooperatives, and partnerships or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines.
  8. The Procuring Entity shall evaluate bids using the *Quality Based Evaluation/Selection (QBE/QBS)* procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
  9. The contract shall be completed within **26 weeks**.
  10. The PIDS reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
  11. For further information, please refer to:

**PIDS - BAC Secretariat**

Philippine Institute for Development Studies  
18<sup>th</sup> Floor, Three Cyberpod Centris - North Tower,  
EDSA corner Quezon Avenue, Quezon City  
Tel. No.: (+63) (02) 8877-4000 local 4006 or 4013  
E-mail: procurement@mail.pids.gov.ph

  
**DR. VALERIE GILBERT T. ULEP**  
Chairperson  
BAC for Consultancy Services

## ***Section II. Eligibility Documents***

## 1. Eligibility Criteria

1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:

- (a) Duly licensed Filipino citizens/sole proprietorships;
- (b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;
- (c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;
- (d) Cooperatives duly organized under
- (e) the laws of the Philippines; or
- (f) Persons/entities forming themselves into a joint venture, *i.e.*, a group of two (2) or more persons/entities that intend to be jointly and severally responsible or liable for a particular contract: Provided, however, That Filipino ownership or interest thereof shall be at least sixty percent (60%). For this purpose, Filipino ownership or interest shall be based on the contributions of each of the members of the joint venture as specified in their JVA.

1.2. When the types and fields of Consulting Services involve the practice of professions regulated by law, those who will actually perform the services shall be Filipino citizens and registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions specified in the **EDS**.

1.3. If the Request for Expression of Interest allows participation of foreign consultants, prospective foreign bidders may be eligible subject to the conditions stated in the **EDS**.

1.4. Government owned or –controlled corporations (GOCCs) may be eligible to participate only if they can establish that they (a) are legally and financially autonomous, (b) operate under commercial law, and (c) are not attached agencies of the Procuring Entity.

## 2. Eligibility Requirements

2.1. The following eligibility requirements, together with the Eligibility Documents Submission Form, shall be submitted on or before the date of the eligibility check specified in the Request for Expression of Interest and Clause 5 for purposes of determining eligibility of prospective bidders:

- (a) Class “A” Documents –

### Legal Documents

- (i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR, except for foreign



bidders participating in the procurement by a Philippine Foreign Service Office or Post, which shall submit their eligibility documents under Section 24.1 of the IRR, provided, that the winning Consultant shall register with PhilGEPS in accordance with Section 37.1.4 of the IRR;

Technical Documents

- (ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:
  - (ii.1) the name and location of the contract;
  - (ii.2) date of award of the contract;
  - (ii.3) type and brief description of consulting services;
  - (ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)
  - (ii.5) amount of contract;
  - (ii.6) contract duration; and
  - (ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- (iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

- (b) Class "B" Document –

If applicable, the Joint Venture Agreement (JVA) in case the joint venture is already in existence, or duly notarized statements from all the potential joint venture partners in accordance with Section 24.1(b) of the IRR of RA 9184.

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to

translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.

- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subconsultants may only participate in the bid of one short listed consultant. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.

### **3. Format and Signing of Eligibility Documents**

- 3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.
- 3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.
- 3.3. The Eligibility Documents Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.
- 3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

### **4. Sealing and Marking of Eligibility Documents**

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. \_\_\_ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
  - (a) contain the name of the contract to be bid in capital letters;
  - (b) bear the name and address of the prospective bidder in capital letters;
  - (c) be addressed to the Procuring Entity's BAC specified in the **EDS**;
  - (d) bear the specific identification of this Project indicated in the **EDS**; and

- (e) bear a warning “DO NOT OPEN BEFORE...” the date and time for the opening of eligibility documents, in accordance with Clause 5.

4.4 Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

## **5. Deadline for Submission of Eligibility Documents**

Eligibility documents must be received by the Procuring Entity’s BAC at the address and on or before the date and time indicated in the Request for Expression of Interest and the EDS.

## **6. Late Submission of Eligibility Documents**

Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 0 shall be declared “Late” and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder’s name, its representative and the time the eligibility documents were submitted late.

## **7. Modification and Withdrawal of Eligibility Documents**

7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as “ELIGIBILITY MODIFICATION” and stamped “received” by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.

7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.

7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach and be stamped by the BAC before the deadline for submission and receipt of eligibility documents.

## **8. Opening and Preliminary Examination of Eligibility Documents**

- 8.1. The BAC will open the envelopes containing the eligibility documents in the presence of the prospective bidders' representatives who choose to attend, at the time, on the date, and at the place specified in the **EDS**. The prospective bidders' representatives who are present shall sign a register evidencing their attendance.

In case the submitted eligibility envelopes cannot be opened as scheduled due to justifiable reasons, the BAC shall take custody of the said envelopes and reschedule the opening on the next working day or at the soonest possible time through the issuance of a Notice of Postponement to be posted in the PhilGEPS website and the website of the Procuring Entity concerned.

- 8.2. Letters of withdrawal shall be read out and recorded during the opening of eligibility documents and the envelope containing the corresponding withdrawn eligibility documents shall be returned unopened to the withdrawing prospective bidder.

- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:

- (f) the name of the prospective bidder;
- (g) whether there is a modification or substitution; and
- (h) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

- 8.4. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered "failed" for the particular eligibility requirement concerned. If a prospective bidder is rated "passed" for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "eligible." If a prospective bidder is rated "failed" in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "ineligible." In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

## **9. Short Listing of Consultants**

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.

- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

## **10. Protest Mechanism**

Decision of the Procuring Entity at any stage of the procurement process may be questioned in accordance with Section 55 of the IRR of RA 9184.

### ***Section III. Eligibility Data Sheet***

# Eligibility Data Sheet

Eligibility Documents	
1.2	<i>Not applicable</i>
1.3	No further instructions.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within <b>five (5) years</b> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	<b><i>Certificate of Satisfactory Service or Completion</i></b> issued by the client, in case of a completed Contract, shall be submitted
4.2	Each prospective bidder shall submit <b>one (1) original, one (1) duplicate copy, and one (1) electronic copy</b> (to be placed in a compact disc/CD or flash drive) of its eligibility documents. Each copy must be placed inside the sealed envelope and must be properly labeled. Electronic copies, aside from placing in a sealed envelope, may also be protected with password.
4.3 (c)	PIDS Bids and Awards Committee for Consulting Services  Philippine Institute for Development Studies, 18th Floor, Three Cyberpod Centris – North Tower, EDSA cor. Quezon Avenue, Quezon City.
4.3 (d)	<b>REI No. 2024-126</b>  <b>Survey Firm for Tracer Study of 4Ps Beneficiaries</b>
5.0	The address for submission of eligibility documents is:  Philippine Institute for Development Studies, 18th Floor, Three Cyberpod Centris – North Tower, EDSA cor. Quezon Avenue, Quezon City  <b><u>procurement@pids.gov.ph</u></b>  The deadline for submission of eligibility documents is <b><i>October 24, 2024 (10:00 AM)</i></b>
8.1	The place of opening of eligibility documents is at the Conference Room of the Philippine Institute for Development Studies, 18th Floor, Three Cyberpod Centris – North Tower, EDSA cor. Quezon Avenue, Quezon City.  The opening of eligibility documents shall be conducted <b>onsite and online</b> . The BAC Secretariat shall facilitate the opening of documents

	<p>onsite while videoconferencing with the BAC. Bidders' representatives have the option to attend onsite or online.</p> <p>Bidders who will opt to attend online should email scanned copy of their authorization letter specifying the name(s) and email address(es) of their representative(s) to <a href="mailto:procurement@pids.gov.ph">procurement@pids.gov.ph</a>.</p> <p>Instructions to join the online conference shall be sent to the email addresses indicated in the authorization letters.</p> <p>The date and time of opening of eligibility documents is <b>October 24, 2024 (1:30PM)</b></p>																																																																											
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9.2	<p>The criteria and rating system for short listing are:</p> <table border="1" data-bbox="421 801 1370 1964"> <thead> <tr> <th colspan="2" data-bbox="421 801 1161 880">Particulars</th> <th data-bbox="1161 801 1370 880">Weight</th> </tr> </thead> <tbody> <tr> <td colspan="2" data-bbox="421 880 1161 947"><b>A. Applicable/Relevant Experience of Consulting Firm</b></td> <td data-bbox="1161 880 1370 947"><b>40%</b></td> </tr> <tr> <td data-bbox="421 947 496 1025"></td> <td data-bbox="496 947 1161 1025"><b>1. Number of years of experience in survey design and operations - at least 5 years</b></td> <td data-bbox="1161 947 1370 1025"><b>15</b></td> </tr> <tr> <td data-bbox="421 1025 496 1070"></td> <td data-bbox="496 1025 1161 1070">No. of years</td> <td data-bbox="1161 1025 1370 1070">Score</td> </tr> <tr> <td data-bbox="421 1070 496 1104"></td> <td data-bbox="496 1070 1161 1104">More than 10</td> <td data-bbox="1161 1070 1370 1104">15</td> </tr> <tr> <td data-bbox="421 1104 496 1149"></td> <td data-bbox="496 1104 1161 1149">9 to 10</td> <td data-bbox="1161 1104 1370 1149">13</td> </tr> <tr> <td data-bbox="421 1149 496 1193"></td> <td data-bbox="496 1149 1161 1193">7 to 8</td> <td data-bbox="1161 1149 1370 1193">11</td> </tr> <tr> <td data-bbox="421 1193 496 1238"></td> <td data-bbox="496 1193 1161 1238">5 to 6</td> <td data-bbox="1161 1193 1370 1238">9</td> </tr> <tr> <td data-bbox="421 1238 496 1272"></td> <td data-bbox="496 1238 1161 1272">Below 5</td> <td data-bbox="1161 1238 1370 1272">Not qualified</td> </tr> <tr> <td data-bbox="421 1272 496 1350"></td> <td data-bbox="496 1272 1161 1350"><b>2. Number of completed projects with a household survey component - at least 2 completed projects</b></td> <td data-bbox="1161 1272 1370 1350"><b>15</b></td> </tr> <tr> <td data-bbox="421 1350 496 1395"></td> <td data-bbox="496 1350 1161 1395">No. of completed projects with household survey</td> <td data-bbox="1161 1350 1370 1395">Score</td> </tr> <tr> <td data-bbox="421 1395 496 1429"></td> <td data-bbox="496 1395 1161 1429">10 and above</td> <td data-bbox="1161 1395 1370 1429">15</td> </tr> <tr> <td data-bbox="421 1429 496 1462"></td> <td data-bbox="496 1429 1161 1462">8 to 9</td> <td data-bbox="1161 1429 1370 1462">13</td> </tr> <tr> <td data-bbox="421 1462 496 1496"></td> <td data-bbox="496 1462 1161 1496">6 to 7</td> <td data-bbox="1161 1462 1370 1496">11</td> </tr> <tr> <td data-bbox="421 1496 496 1529"></td> <td data-bbox="496 1496 1161 1529">2 to 5</td> <td data-bbox="1161 1496 1370 1529">9</td> </tr> <tr> <td data-bbox="421 1529 496 1563"></td> <td data-bbox="496 1529 1161 1563">Below 2</td> <td data-bbox="1161 1529 1370 1563">Not qualified</td> </tr> <tr> <td data-bbox="421 1563 496 1619"></td> <td data-bbox="496 1563 1161 1619"><b>3. No. of completed projects in the last 5 years</b></td> <td data-bbox="1161 1563 1370 1619"><b>10</b></td> </tr> <tr> <td data-bbox="421 1619 496 1664"></td> <td data-bbox="496 1619 1161 1664">No. of completed projects</td> <td data-bbox="1161 1619 1370 1664">Score</td> </tr> <tr> <td data-bbox="421 1664 496 1697"></td> <td data-bbox="496 1664 1161 1697">10 and above</td> <td data-bbox="1161 1664 1370 1697">10</td> </tr> <tr> <td data-bbox="421 1697 496 1731"></td> <td data-bbox="496 1697 1161 1731">8 to 9</td> <td data-bbox="1161 1697 1370 1731">9</td> </tr> <tr> <td data-bbox="421 1731 496 1765"></td> <td data-bbox="496 1731 1161 1765">7 to 8</td> <td data-bbox="1161 1731 1370 1765">8</td> </tr> <tr> <td data-bbox="421 1765 496 1798"></td> <td data-bbox="496 1765 1161 1798">6 to 7</td> <td data-bbox="1161 1765 1370 1798">7</td> </tr> <tr> <td data-bbox="421 1798 496 1832"></td> <td data-bbox="496 1798 1161 1832">5 and below</td> <td data-bbox="1161 1798 1370 1832">5</td> </tr> <tr> <td colspan="2" data-bbox="421 1832 1161 1910"><b>B. Qualification of Survey Team Manager</b></td> <td data-bbox="1161 1832 1370 1910"><b>40%</b></td> </tr> <tr> <td data-bbox="421 1910 496 1964"></td> <td data-bbox="496 1910 1161 1964"><b>1. Education</b></td> <td data-bbox="1161 1910 1370 1964"><b>20</b></td> </tr> </tbody> </table>	Particulars		Weight	<b>A. Applicable/Relevant Experience of Consulting Firm</b>		<b>40%</b>		<b>1. Number of years of experience in survey design and operations - at least 5 years</b>	<b>15</b>		No. of years	Score		More than 10	15		9 to 10	13		7 to 8	11		5 to 6	9		Below 5	Not qualified		<b>2. Number of completed projects with a household survey component - at least 2 completed projects</b>	<b>15</b>		No. of completed projects with household survey	Score		10 and above	15		8 to 9	13		6 to 7	11		2 to 5	9		Below 2	Not qualified		<b>3. No. of completed projects in the last 5 years</b>	<b>10</b>		No. of completed projects	Score		10 and above	10		8 to 9	9		7 to 8	8		6 to 7	7		5 and below	5	<b>B. Qualification of Survey Team Manager</b>		<b>40%</b>		<b>1. Education</b>	<b>20</b>
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		Education	Score
		PhD in related field	20
		MA/MS in related field or PhD in non-related field	18
		MA/MS in related field	16
		MA/MS in non-related field or BS degree	Not qualified
		<b>2. Years of experience in survey research</b>	<b>20</b>
		No. of Years	Score
		12 and above	20
		9 to 11	18
		6 to 8	16
		3 to 5	14
		Below 3 years	Not qualified
		<b>C. Current Workload of Firm</b>	<b>20%</b>
		No. of projects	Score
		0-1	20
		2-3	18
		4-5	16
		6-7	14
		8 and above	12
	<b>Minimum Score/Hurdle Rate: 65%</b>		

## ***Section IV. Terms of Reference***

## ***Section V. Eligibility Submission Forms***

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Statement of Ongoing Contracts and Awarded But Not yet Started Contract - ANNEX E .....	35

ELIGIBILITY DOCUMENTS SUBMISSION FORM

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[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated [insert date] for [Title of Project], [Name of Consultant] hereby expresses interest in participating in the eligibility and short listing for said Project and submits the attached eligibility documents in compliance with the Eligibility Documents therefor.

In line with this submission, we certify that:

- a) [Name of Consultant] is not blacklisted or barred from bidding by the GoP or any of its agencies, offices, corporations, LGUs, or autonomous regional government, including foreign government/foreign or international financing institution; and
- b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.

We acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our submission irrespective of whether we are declared eligible and short listed or not.

We further acknowledge that failure to sign this Eligibility Document Submission Form shall be a ground for our disqualification.

Yours sincerely,

Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address

## STATEMENT OF THE CONSULTANT'S NATIONALITY

*[Name and address of the Procuring Entity]*

Ladies/Gentlemen:

In compliance with the requirements of the **Philippine Institute for Development Studies**, for the **[Project Title]** under **[Reference No.]**, I/We hereby declare the following:

1. [Select one and delete the rest]

*[If domestic entity bidder]* That (Name of Bidder) is a domestic *sole proprietorship/partnership/corporation/joint venture* organized or formed under the laws of the Philippines;

*[If foreign entity bidder]* That (Name of Bidder) is a foreign *sole proprietorship/partnership/corporation/joint venture* organized or formed under the laws of the (Name of Country);

*[If foreign entity bidder]* That (Name of Bidder) is registered with the Securities and Exchange Commission and/or any agency authorized by the laws of the Philippines;

2. That the following are/is the proposed Consultants:

Name of Proposed Consultant	Proposed Position	Nationality	Proof of Identification
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

3. That attached herewith are the Curriculum Vitae of the abovementioned personnel (*Annex/es \_\_\_\_\_*); and

4. That the undersigned is/are the authorized representative/s for this public bidding as evidenced by herewith attached **NOTARIZED AUTHORITY**.

Very truly yours,

Signature: \_\_\_\_\_

Name and Title of Authorized Signatory: \_\_\_\_\_

Name of Consultant/Company: \_\_\_\_\_

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

Email Address: \_\_\_\_\_

Contact Nos: \_\_\_\_\_

## ANNEX C

### FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

Proposed Position: \_\_\_\_\_

Name of Firm: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Profession: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Years with Firm/Entity: \_\_\_\_\_ Nationality: \_\_\_\_\_

Membership in Professional Societies: \_\_\_\_\_

\_\_\_\_\_

Detailed Tasks Assigned: \_\_\_\_\_

\_\_\_\_\_

#### **Key Qualifications:**

*[Give an outline of staff member's experience and training most pertinent to tasks on project. Describe degree of responsibility held by staff member on relevant previous projects and give dates and locations. Use about half a page.]*

\_\_\_\_\_

#### **Education:**

*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]*

\_\_\_\_\_

#### **Employment Record:**

*[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in last ten years, also give types of activities performed and client references, where appropriate. Use about two pages.]*

\_\_\_\_\_

**Languages:**

[For each language, indicate proficiency: excellent, good, fair, or poor in speaking, reading, and writing.]

**Certification:**

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

**Commitment:**

I also commit to work for the Project in accordance with the time schedule as indicated in the contract once the firm is awarded the Project.

\_\_\_\_\_  
[Signature of staff member and authorized representative of the firm] Date: \_\_\_\_\_  
Day/Month/Year

Full name of staff member: \_\_\_\_\_

Full name of authorized representative: \_\_\_\_\_

**SUBSCRIBED AND SWORN** to before me this \_\_\_ day of [month] [year] at [place of execution], Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her [insert type of government identification card used], with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_\_ day of [month] [year].

**NAME OF NOTARY PUBLIC**

**Serial No. of Commission** \_\_\_\_\_

**Notary Public for** \_\_\_\_\_ **until** \_\_\_\_\_

**Roll of Attorneys No.** \_\_\_\_\_

**PTR No.** \_\_, [date issued], [place issued]

**IBP No.** \_\_, [date issued], [place issued]

**Doc. No.** \_\_\_\_

**Page No.** \_\_\_\_

**Book No.** \_\_\_\_

**Series of** \_\_\_\_.



**STATEMENT OF COMPLETED CONTRACTS**

This is to certify that \_\_\_\_\_ (consultant) \_\_\_\_\_ has the following completed contracts:

PROJECT NAME (including NAME, ADDRESS OF CLIENT, CONTACT NO. )	DATE OF CONTRACT	TYPE OF CONTRACT	START DATE	COMPLETION DATE	AMOUNT OF CONTRACT	CONSULTANT'S ROLE (DESCRIPTION OF ACTUAL SERVICES PROVIDED)

\_\_\_\_\_  
Name and Signature of Authorized Representative

\_\_\_\_\_  
Date

**STATEMENT OF ONGOING CONTRACTS AND AWARDED BUT NOT YET STARTED CONTRACTS**

This is to certify that \_\_\_\_\_ (consultant) \_\_\_\_\_ has the following ongoing and awarded but not yet started contracts:

DATE OF CONTRACT	CONTRACTING PARTY	NAME OF CONTRACT	TYPE OF CONTRACT	BRIEF DESCRIPTION OF CONSULTING SERVICE	AMOUNT OF CONTRACT	VALUE OF OUTSTANDING CONTRACT	CONSULTANT IS: a. main consultant b. subcontractor c. partner in a JV

\_\_\_\_\_  
Name and Signature of Authorized Representative

\_\_\_\_\_  
Date

