




## REQUEST FOR PROPOSAL

1. The Philippine Institute for Development Studies (PIDS) invites all eligible individual consultants to submit proposals for the **Hospital Financial Statement Encoding Consultant for DOH-PHIC-PIDS Technical Assistance on the UHC Provider Payment Reforms for 2024: Diagnosis-Related Groups, Comprehensive Outpatient Benefit Package, and the Center for Healthcare Finance and Economics.**
2. The Approved Budget for the Contract (ABC) is **PhP986,370.00.**
3. Interested consultants must submit the following documents using PIDS the prescribed forms:
  - a) Curriculum Vitae of the proposed Consultant(s)<sup>1</sup>
  - b) Technical Proposal Form<sup>1</sup>
  - c) Financial Proposal Form<sup>1</sup>
  - d) Filled out Data Privacy Notice and Personal Data Protection Form<sup>1</sup>
  - e) Statement of Completed contracts<sup>2</sup>
  - f) Statement of All Ongoing and Awarded But Not Yet Started Contracts<sup>2</sup>
  - g) Notarized Omnibus Sworn Statement (for ABC above PhP50,000.00)<sup>1</sup>
  - h) Income/Business Tax Returns (for ABC above PhP500,000.00)<sup>1</sup>
  - i) PhilGEPS Registration Number (certificate or screenshot)<sup>1</sup>
  - j) Valid Mayor's/Business Permit (Firm) or BIR Certificate of Registration<sup>3</sup> (Individual).
4. Interested consultants may obtain further information from the Procurement Management Division at telephone via email at [procurement@pids.gov.ph](mailto:procurement@pids.gov.ph).
5. The Institute shall adopt the Quality-Based Evaluation procedure in selecting consultants based on the attached Terms of Reference.
6. The deadline for submission of proposals is on **20 January 2025 (5:00 PM)** addressed to:

The BAC Chairperson for Consultancy  
Services c/o The BAC Secretariat  
Procurement Management Division  
18/F Three Cyberpod Centris – North Tower, EDSA cor. Quezon Ave., Quezon City

Proposals may also be submitted through email at [procurement@pids.gov.ph](mailto:procurement@pids.gov.ph).

7. PIDS reserves the right to reject any or all of the proposals, declare a failure of bidding, or not award the contract if there is evidence of collusion, including any act that restricts, suppresses, or nullifies competition, or if there is a failure to follow the prescribed bidding procedures. PIDS also reserves the right to waive any required formality in the proposals received and select the proposal it determines most advantageous to PIDS.

  
**DR. AUBREY D. TABUGA**  
Chairperson  
PIDS-BAC for Consultancy Services

Reference No.:2025-011

<sup>1</sup>Applicable for individual consultants and firms

<sup>2</sup>Applicable for firms only

<sup>3</sup> Individual consultants must issue Official Receipt (OR) during payment.

**Philippine Institute for Development Studies**  
**TERMS OF REFERENCE**

**Hospital Financial Statement Encoding Consultant**  
**for**  
**DOH-PHIC-PIDS Technical Assistance on the UHC Provider Payment Reforms for 2024: Diagnosis-Related Groups, Comprehensive Outpatient Benefit Package, and the Center for Healthcare Finance and Economics<sup>1</sup>**

**1. Background and Rationale**

With the enactment of the Universal Health Care (UHC) law, the Philippine Health Insurance Corporation (PhilHealth) has been empowered to be the national strategic purchaser of individual-based health services. A critical health provider payment mechanism (PPM) reform that PhilHealth must implement under the UHC Law is the Diagnosis Related Groupings (DRGs). The DRGs are a step forward to move the current all-case rate system from retrospective payments based only on service outputs to value-based payments that incentivizes quality, efficiency, and equitable care and improve health at lower costs for the health sector and patients.

Moreover, such a complex reform requires that PhilHealth maintain the DRGs and other PPM systems over the long term. This requires improving PhilHealth's data quality and monitoring frameworks and plans to evaluate whether these reforms achieve its goals for value-based purchasing. On both these fronts, PIDS will be assisting PhilHealth in the development of DRG payment rates and the monitoring and evaluation for the DRGs and PPMs.

**2. Objectives**

1. Monitoring and Evaluation (M&E) for (a) trends in health care utilization across the life course and (b) assessment of baseline trends for quality and equity of DRGs, and other PhilHealth benefits and reforms
2. Policy support and recommendations for DRGs and related PPM reforms in (a) health financing policy and gaps, (b) policy decisions to use DRG for actual reimbursement, (c) health data policy standards and gaps
3. Charge analysis and costing methodology: (a) analysis of charge data and development of charge libraries, (b) review and revision of PhilHealth costing methodologies, policies, and forms
4. DRG rate-setting calculation and documentation of the development process

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<sup>1</sup> This engagement will be charged against the study DOH-PHIC-PIDS Technical Assistance on the UHC Provider Payment Reforms for 2024: Diagnosis-Related Groups, Comprehensive Outpatient Benefit Package, and the Center for Healthcare Finance and Economics.

5. Capacity building for PIDS, PhilHealth, DOH, Providers, and other stakeholders: (a) technical capacity building for DRG implementers, (b) communication of DRG and PPM reforms to providers and the public
6. Comprehensive Outpatient Benefit Package (COBP): classification of services according to PhilHealth COBP design and National Practice Guidelines (NPG)

### **3. Objectives of the Consultancy**

The recent developments of the project necessitate the engagement of a consultant to implement data collection, encoding, verification, data cleaning, and data storage for datasets relevant to the provider purchasing mechanism reports. The specific technical outputs expected from PIDS can be satisfactorily and promptly met through the inputs coming from field experts/technical consultant.

### **4. Scope of Work, Deliverables, and Schedule of Payment Releases**

Under the guidance and technical oversight of a PIDS Research Fellow who serves as the Project Director, the Hospital Financial Statement Encoding Consultant is expected to work with the Project Team and undertake the following tasks/activities:<sup>2</sup>

1. Organize a team of encoders who will work on encoding a maximum sample of 8,540 full financial statements from health facilities. These financial statements cover financial years 2020 to 2024, with 1,915, 1,889, 1,872, 1,879, and 1,884 hospitals accredited each year, respectively.
2. Accurately input financial statement data into databases, spreadsheets, or systems.
  - a) Ensure that data is correctly formatted, complete, and error-free
  - b) Handle high volumes of data entry tasks with precision
  - c) Attend training/s on proper encoding of data
3. Ensure data validation, verification, and security
  - a) Check and verify the accuracy of data before and after entry
  - b) Carefully handle sensitive information and follow data privacy regulations
  - c) Adhere to team policies regarding data confidentiality and information security
4. Implement reporting and documentation:
  - a) Report to the core research team any inconsistencies or problems with data
  - b) Resolve any queries of the core research team from any unclear data entries
5. Sign a Non-Disclosure Undertaking with PIDS. Any information gathered and generated in the implementation of the project shall be processed subject to the applicable provisions of the Republic Act. No. 10173, known as the "Data Privacy Act of 2012" and its Implementing Rules and Regulations and relevant issuances of the National Privacy Commission (NPC); and

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<sup>2</sup> If the Consultant needs to undertake physical/ face-to-face interviews and data collection and related activities, the Consultant has to ensure compliance with existing and future policies, rules, and resolutions as may be issued by concerned government agencies pertaining to health and safety.

6. Perform such other professional, highly technical, and confidential duties and responsibilities as the Research fellow may assign from time to time.

The Consultant will prepare the following outputs based on the schedule below:

Activities and Deliverables <sup>3</sup>	Due Dates	Payment Tranches
First batch of encoded, verified, and correctly formatted hospital financial statements (15% of total)	January 31, 2025	15%
Document on security protocols for access and storage of data		
Second batch of encoded, verified, and correctly formatted hospital financial statements (20% of total)	February 28, 2025	20%
Third batch of encoded, verified, and correctly formatted hospital financial statements (20% of total)	March 31, 2025	20%
Fourth batch of encoded, verified, and correctly formatted hospital financial statements (20% of total)	April 30, 2025	20%
Fifth batch of encoded, verified, and correctly formatted hospital financial statements (20% of total)	May 31, 2025	20%
Sixth batch of encoded, verified, and correctly formatted hospital financial statements (5% of total)	June 30, 2025	5%
Turnover of data and materials used together with Certification indicating the turnover of as well as the deletion of such data and that it will allow PIDS to verify if the data is complete		

NOTE: Payments will be based on the acceptance and approval by PIDS of the corresponding outputs.

## 5. Qualifications of the Consultant

The Firm should have the following qualifications:

- a) A research or related institution with the professional capacity to encode and compile data from individuals, LGUs, and civil society organizations..
  - a. With a Research Specialist having at least Bachelor's Degree in Epidemiology, Public Health, Health Economics, or health-related fields.
  - b) At least 2 years professional or research experience in health systems, health financing, and public health.

<sup>3</sup> For applicable outputs, the draft and final reports submitted by the consultants should be aligned with the following guidelines: PIDS' Guide in the Preparation of Manuscript for Publication and General Guidelines in Preparing and Formatting a PIDS Discussion Paper, Guidelines in the preparation of Policy Notes.

For research outputs that will be released as a PIDS Discussion Paper (DP), the consultant shall prioritize the publication outlets of PIDS, particularly the peer-reviewed Philippine Journal of Development (PJD) and Research Paper Series (RPS). If the DP is not selected by PIDS Management for publication either as a PJD article or an RPS issue, the consultant may identify other dissemination outlets outside of PIDS. Guidelines for Authorship in PIDS Research Projects shall apply.



c) Advanced skills in the management of databases, data quality checks, initial data processing, project management, and communication

## 6. Project Duration

The engagement will commence upon the signing of the contract until **June 30, 2025**, on a part-time basis. The Consultant's work must be completed within this period, and no man-days will be chargeable after this date.

## 7. Approved Budget for the Contract

The approved budget for this consulting service is up to **₱986,370.00** for a total number of 8,540 financial statements. The payment for the Consultant shall be processed upon submission of the required outputs as specified in the Scope of Work and Deliverables of this TOR. The actual payment amount will be based on the actual outputs submitted and approved by PIDS.<sup>4</sup>

This amount does not include travel and accommodation during field work. PIDS will shoulder the cost of fieldwork (if any). PIDS shall not cover hospitalization and other COVID-related health expenses of the consultant as no employer-employee relationship exists between the PIDS and the Consultant.

## 8. Evaluation Criteria

### a. Evaluation Criteria


Applicant consultants will be revaluated based on the following criteria:

<p><b>Consultant Qualifications</b> The Firm should have the following qualifications:</p> <ul style="list-style-type: none"> <li>• A research or related institution with the professional capacity to collect data from individuals, LGUs and civil society organizations and conduct descriptive analyses of the collected data <ul style="list-style-type: none"> <li>a. With a Research Specialist having at least Bachelor's Degree in Epidemiology, Public Health, Health Economics, or health-related fields.</li> </ul> </li> <li>• At least 2 years professional or research experience in health systems, health financing, and public health.</li> </ul>	50%
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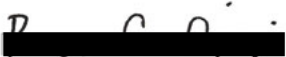
<sup>4</sup> Each Financial Statement (FS) is equivalent to P115.50, based on the assumption that 16 to 17 FS can be encoded within the day and following the daily rate for data encoders as per the PIDS Standard Charging Rates [1900/day divided by 16.45 FS/day = 115.50 per FS]

<ul style="list-style-type: none"> <li>Advanced skills in the management of databases, data quality checks, initial data processing, project management, and communication</li> </ul>	
Plan of approach and methodology; <ul style="list-style-type: none"> <li>Clarity, feasibility, innovativeness, and comprehensiveness of the approach</li> <li>Incisive interpretation of problems and reflection on suggested solutions</li> </ul>	50%
Total	100%

b. Detailed rating sheet (see attached file)

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