



Republic of the Philippines

National Economic and Development Authority

Region IV-A (CALABARZON)

REQUEST FOR PROPOSAL

FOR THE PROCUREMENT OF PROFESSIONAL SERVICES TO FACILITATE THE STRATEGIC PLANNING WORKSHOP

1. The CALABARZON Regional Development Council, through NEDA IV-A Bids and Awards Committee (NBAC), intends to engage a **Professional Services for the Engagement of a Consultant to Facilitate the Strategic Planning Workshop** through the employment of Section 53.9 (Negotiated Procurement – Small Value Procurement) of 2016 Revised Implementing Rules and Regulations of Republic Act 9184. Details of the project are in the Terms of Reference (TOR), attached hereto as **Annex A**.
2. The **Approved Budget for the Contract (ABC) is Three Hundred Thousand Pesos (PHP300,000.00)**, a lump sum amount inclusive of applicable government taxes and charges and all other incidental expenses. The engagement shall be for **ninety (90) calendar days**, commencing from the date of receipt of the Notice to Proceed (NTP) by the Consultant.
3. Interested consultants are required to submit in sealed envelopes, one (1) original copy and two (2) copies of the first and second components of the proposal/bid, plus the electronic copy (e-copy) saved in two (2) USBs¹, to the NBAC **on or before 1 February, 12:00 NN** at the 1st Floor, Finance and Administrative Division, NEDA Region IV-A Building, Barangay Milagrosa (Tulo), Calamba City, Laguna. **Late submissions shall not be accepted.**

The 1st envelope shall contain the following:

A. Eligibility Documents

1. Mayor's/ Business Permit;
2. PhilGEPS Registration Number/PhilGEPS Certificate of Platinum Membership;
3. SEC or DTI Registration
4. BIR-approved Tax Clearance
5. Company profile
6. List of ongoing and completed private and government contracts for similar projects over the past 3 years (via face-to-face and online platform)
7. List of clients (with a contact person and contact number), services rendered, and contract amount (local and/or international)

¹ 1 USB for 1st Envelope, and 1 for 2nd Envelope

8. Omnibus Sworn Statement using GPPB prescribed Form (**please use the form attached hereto as *Annex B***).

The Omnibus Sworn Statement shall be accompanied by a duly **notarized Special Power of Attorney, Board/Partnership Resolution, or Secretary's Certificate**, whichever is applicable, granting the representative of the bidder authority to do, execute and perform all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for the subject procurement.

B. Technical Proposal Documents

1. Technical Proposal Forms (**please use TPF1 to TPF8 attached hereto as *Annex C***)

TPF1. Technical Proposal Submission Form

TPF2. Consultant's References

TPF3. Comments and Suggestions on the Terms of Reference and Data, Services and Facilities to be provided by NEDA

TPF4. Description of the Methodology and Work Plan for Performing the Project

TPF5. Team Composition and Task

TPF6. Curriculum Vitae (CV) for Proposed Professional Staff TPF7.

Time Schedule for Professional Personnel

TPF8. Activity (Work) Schedule

2. **Certificate of satisfactory service** on delivering quality service within schedule and/or results of client satisfaction survey/s administered from **at least two (2)** of its previous clients within the last three (3) years.
3. Statement of the consultant specifying its nationality and confirming that those who will perform the services are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions

The 2nd envelope shall contain the following:

- A. Financial Proposal Forms (**please use FPF1 to FPF6 attached hereto as *Annex D***)

FPF1. Financial Proposal Submission Form FPF2.

Summary of Costs

FPF3. Breakdown of Price per Activity

FPF4. Breakdown of Remuneration per Activity FPF5.

Reimbursable per Activity

FPF6. Miscellaneous Expenses

***Note:* Financial Proposal must be inclusive of all applicable government taxes and charges. Sample templates as a guide for bidders in filling out FPF1 and FPF 2 are attached hereto as *Annex E*.**

- B. The consultant's audited financial statements, showing, among others, the

consultant's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of submission of the proposal.

4. Interested consultants shall enclose their original Eligibility Documents and Technical Documents in one sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS AND TECHNICAL DOCUMENTS", and the original of their Financial Proposal in another sealed envelope marked "ORIGINAL – FINANCIAL PROPOSAL", sealing them all in an outer envelope marked "ORIGINAL PROPOSAL".
5. Each copy of the first, second, and third envelopes shall be similarly sealed duly marking the inner envelopes as "COPY NO. - ELIGIBILITY DOCUMENTS AND TECHNICAL PROPOSAL" and "COPY NO. - FINANCIAL PROPOSAL"

and the outer envelope as "COPY NO. ", respectively. These envelopes containing the original and the copies shall then be enclosed in one single envelope. **See diagram attached hereto as Annex F.**

One (1) USB labeled "1st Envelope" shall contain the e-copy of the Eligibility Documents and Technical Proposal Documents while another **one (1) USB labeled "2nd Envelope"** shall contain the e-copy of the Financial Proposal.

6. The schedule of SVP activities shall be as follows:

Activities	Schedule	
	Date	Time
Posting of the Request for Proposal	12 January 2022	-
Pre-Bid Conference	20 January 2022	2:00 PM
Deadline for submission of Proposals ²	1 February 2022	12:00 NN
Opening of Proposals (Legal & Technical Documents)	1 February 2022	1:30 PM

² *Eligibility, Technical, and Financial Proposal*

7. The Small Value Procurement (SVP) process will be conducted through simultaneous opening and evaluation of the legal requirements and technical proposals which will be opened using the non-discretionary "pass/fail" criterion as specified in the 2016 Revised IRR of RA 9184.
8. The CALABARZON Regional Development Council, through NBAC, will hold a **virtual Pre-Bid Conference on 20 January 2022, 2:00 PM**, which shall be open to all interested parties with a written authorization letter from their principals. The NBAC will be using Zoom as the videoconferencing platform. An interested consultant should submit a letter in advance, addressed to the NBAC Chairperson via electronic mail at **gs.neda4a@gmail.com**, containing the name, email address, and contact number of its authorized representative/s, and certifying that said representative/s has/have authority to speak for and on behalf of the Consultant.

Note: Opening of Proposals shall be held in the presence of the participating consultants' authorized representatives via videoconferencing.

Interested consultants will submit the eligibility, technical and financial proposals. The eligibility will be opened first. Those firms that pass the first screening through presence/absence of document will proceed to the opening of the Technical Proposal. The TWG will conduct its evaluation. Those that pass the hurdle rate will be invited to the opening of the Financial Proposal.

9. Proposals shall be evaluated using the Quality-Cost Based Selection/Evaluation (QCBS/E) procedure at a weight ratio of **80% for the Technical Proposal and 20% for the Financial Proposal**. The criteria and rating system for the evaluation of proposals are provided in the TOR.
10. The complete set of Request for Proposal and the TOR may be acquired by interested Consultants at the 1st Floor, Finance and Administrative Division, NEDA Region IV-A Building, Barangay Milagrosa (Tulo), Calamba City, Laguna.

It may also be downloaded free of charge from the websites of the Philippine Government Electronic Procurement System (PhilGEPS) and the NEDA Region IV-A website (<https://calabarzon.neda.gov.ph/>).

11. The CALABARZON Regional Development Council, through NBAC, reserves the right to accept or reject any proposals, declare a failure of bidding, or not award the contract at any time before contract award under Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected interested consultants.
12. The CALABARZON Regional Development Council/NEDA IV-A shall in no case be held responsible or liable for any costs incurred by the consultant.
13. For further information, please refer to:

MARY CREZEL A. PRANGAN

*Acting Secretariat, Bids and Awards Committee
NEDA Region IV-A Building, Barangay Milagrosa (Tulo),
Calamba City, Laguna 4027
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Website: <https://calabarzon.neda.gov.ph/>*

Issued on 12 January 2022.


VALTER L. MORADA
Chairperson, NEDA IV-A BAC and
OIC-Assistant Regional Director, NEDA IV-A

Terms of Reference
ENGAGEMENT OF A CONSULTANT
TO FACILITATE THE STRATEGIC PLANNING WORKSHOP

I. Background

The CALABARZON Regional Development Council (RDC) reactivated the Investment Promotion Group (IPG) in June 2016 through RDC Resolution No. IV-A-67-2016. The IPG serves as the institutional mechanism to promote trade and investment in CALABARZON. Correspondingly, the IPG-Technical Working Group (IPG-TWG) chaired by DTI was created on August 15, 2017, as the technical arm of the IPG.

The RDC, during its Full Council Meeting on March 14, 2018, confirmed the RDC Execom Resolution No. IV-A-01-2018: "Approving the Creation of a Committee for each of the Five (5) CALABARZON Priority Industries", namely: Electronics, Metals, Automotive, IT-BPM, and Petrochemicals. Each Committee was thereby tasked to prepare Action Plans to implement the recommendations of the Preliminary Studies on the Five (5) Priority Industries conducted by the state universities and colleges in the region.

During the 4th IPG-TWG Meeting conducted on September 19, 2018, at Lima Park Hotel in Batangas, it was discussed and agreed that a Strategic Planning Workshop for the CALABARZON Investment Promotion Program be conducted to have a clear direction and blueprint for moving forward considering that the institutional mechanism is already in place. This strategic planning process is needed to help the group develop a clear vision and mission, set goals, define ways/strategies to meet the goals, and finally, develop action plans.

This activity has been approved in the Work and Financial Plan (WFP) since 2019 as a face-to-face activity. With circumstances such as the failed bidding in 2019 and the health and safety situation brought to us by the Global COVID-19 pandemic in 2020, it remains unimplemented. During April 28, 2021, IPG-TWG meeting on the discussion for the revision of the IPG WFP, it was suggested to conduct the Workshop online in consideration that it has been long overdue and new strategies should be formulated to adapt to the New Normal. To address this concern, a consulting firm with experience in conducting workshops via an online platform is necessary to implement the strategic planning workshop.

II. Objectives

The general objective is to bring together in an online platform the relevant key industry players in the government and private sectors to develop a Strategic Plan for CALABARZON focusing on Investment Promotion.

Specifically, the strategic planning intends to achieve the following:

1. Develop a strategic plan within a short-term, medium-term, and long-term plan for the Investment Promotion Program of CALABARZON
2. Develop and determine, in a consensus manner, the vision, mission, goals, objectives, core values, and strategies of the CALABARZON IPG which will serve as a blueprint for steering the IPG, TWG, and the concerned Priority Industry Committees (Electronics, Metals, Automotive, Petrochemical, and IT-BPM)
3. Determine priority investment promotion projects and come up with an action plan for the IPG as a group and the regional five (5) priority industries and Agribusiness per province.

III. Scope of Work

The scope and focus of the assignment are to provide technical and facilitation support to the creation of a Strategic Plan for Investment Promotion Program in CALABARZON. In particular, the Consulting Firm shall perform the following tasks:

- Submit a proposal outlining the concept and design of the Strategic Planning Workshop, Moderation Plan, and Pre-workshop template based on the proposed program (please see attached)
- Conduct a pre-consultation activity with the IPG-TWG members
- Facilitate and moderate the conduct of 5-day Strategic Planning Workshop with plenary and break-out sessions
- Submit the formulated Strategic Plan with Analysis, Interpretation, Conclusions/ Recommendations containing Vision, Mission, Core Values and Goals; Strategies, Work Plan for Investment Promotion and Action Plan for each of the top 5 priority industries and Agribusiness in collaboration Submit workshop proceedings/documentation.

IV. Qualification Requirements

The Consulting Firm shall comply with the following:

Competency Requirements

a. Consulting Firm

- Must have experience in facilitating/conducting Strategic Planning for the last three (3) years
- Must have at least two (2) completed projects for government agencies for the last five (5) years in Strategic Planning Facilitation
- Must have at least six (6) conducted workshops/training via the online platform
- Must assign/dispatch a consultant or group of Consultants to conduct/facilitate the Strategic Planning workshop in plenary and breakout sessions
- Should be registered with the Philippine Government Electronic Procurement System (PhilGEPS) as a legitimate service provider for government requirements and with complete business registration documents (please see attached required documents for submission)

b. Facilitator(s)

- Must have experience in facilitating/conducting Strategic Planning for the last three (3) years
- Must have experience in investment promotions for the last three (3) years
- Must have experience/involvement in any of the following: developing Roadmaps; Industry Development Plans; SWOT Analysis; Value Chain Analysis; Industry Clustering Strategies and other similar works for the last three (3) years
- Must have the ability to effectively facilitate consultations/workshops, a strong command of the English language excellent verbal and written communication skills based on the positive feedback/ratings received from the previous engagements
- Must have experience in conducting/facilitating workshops/training via the online platform
- Must have attended at least 30 hours of training on investment promotions and any related field within the last five (5) years
- A bachelor degree holder in Business Administration, Management, or any related courses covering Strategic Planning

c. Documenter

- Must have experience in providing documentation services for the last three (3) years
- A bachelor degree holder in Administration or any related courses

Other Requirements

- a. Under RA No. 9184 and its revised Implementing Rules and Regulations (IRR), the proposals shall be evaluated using the Quality-Cost Based Evaluation (QCBE) procedure, 80% technical proposal, and 20% financial proposal ratio.
- b. To pass the technical evaluation, the Consulting Firm must pass the **hurdle rate of 60%**, based on the following set of criteria:

Criteria	Score/Points
1. Experience and Capability of the Consulting Firm	30
2. Experience and Capability of the Facilitator(s)	40
3. Experience and Capability of the Documenter	10
4. Financial Capability	20
Total	100

V. Roles and Responsibilities:

1. The **Contractee (RDC CALABARZON)** through the **IPG-TWG** shall:

- a. Gather and provide the consultant with data needed for the workshop to include but not limited to the following:
 - Industry situationers/profiles/roadmaps
 - Value and Supply Chains, if available
 - Results of Preliminary Studies of the 5 Priority Industries
 - CALABARZON Regional & Provincial Investment Priority Areas
 - List of provincial priority investment projects
 - Relevant policies (RDC resolutions, national directives, laws)
 - Other relevant data
- b. Coordinate with the consulting firm/consultant(s)
- c. May provide the online platform during strategic planning workshop for participants greater than 100 if the consulting firm cannot accommodate more than 100 participants (Regular Zoom account can only accommodate up to 100 participants)
- d. Review and accept the final deliverables based on TOR's content and quality during the IPG-TWG meeting.

2. The **Consulting firm** shall:

- a. Prepare and submit proposal workshop design, moderation plan, and pre-workshop template to include investment promotions projects based on the proposed program
- b. Present the proposal and moderation plan during the pre-consultation meeting with the members of the IPG-TWG
- c. Conduct/facilitate/document the 5-day Strategic Planning Workshop
- d. Act as the main provider of the online platform to be used during strategic planning workshops to have control of the facilitation/workshop procedures
- e. Present the Strategic Plan with Analysis, Interpretation, Conclusions/Recommendations containing the following (softcopy of editable PowerPoint and printed copies):
 - Vision, Mission, Core Values, and Goals
 - Strategies: short (1-3 yr.), medium (3-5 yr.), and long term (5-10 yr.)
 - Investment Promotion Programs for CALABARZON
 - Work Plan for Investment Promotion
 - Action Plan containing investment projects for priority industries: Automotive, Metals, Electronics, Petrochemical, IT-BPM and other industries
- f. Submit the final output to the IPG-TWG
- g. Submit workshop documentations/proceedings (softcopy of editable Word format and printed copies).

VI. Tasks, Deliverables, and Duration

The work of the Consulting Firm commences upon the issuance of the notice to proceed after contract signing and to be conducted within the time frame specified below¹.

Scope of Work/Tasks	Deliverables	Month 1				Month 2				Month 3			
		Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4
Procurement													
Endorsement to BAC	TOR endorsed to BAC												
Contract signing and Issuance of Notice to Proceed	Contract signed and Issued Notice to Proceed (NTP)												
Pre-consultation													
Turnover of materials to the service provider	Materials submitted to the service provider during the issuance of Notice to Proceed												
Submission of workshop design, pre-workshop template, and moderation plan for approval	Workshop design, pre-workshop template, and moderation plan submitted within 7 days upon NTP												
Pre-consultation meeting to discuss workshop design, program, and mechanics (moderation plan)	Workshop design, program, and mechanics (moderation plan) pre-consultation meeting conducted												
Approval of workshop design pre-workshop template and moderation plan by IPG-TWG	Workshop design, pre-workshop template, and moderation plan approved by IPG-TWG												
Pre-workshop													
Data Gathering: provision of Pre-workshop template to target participants to be presented during the day of the workshop	Template accomplished by target participants and to be presented during the day of the workshop												

¹One Calendar month = 30 days

Scope of Work/Tasks	Deliverables	Month 1				Month 2				Month 3				
		Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	Wk 1	Wk 2	Wk 3	Wk 4	
Actual Workshop														
Conduct of Strategic Planning Workshop via an online platform(5 days) with plenary breakout sessions	Workshop conducted/ facilitated													
Post-workshop														
Preparation of Strategic Plan Manuscript with Analysis, Interpretation, Conclusions and Recommendations and Document proceedings	Strategic Plan with Analysis, Interpretation, Conclusions and Recommendations and Document proceedings prepared													
Presentation of the Strategic Plan and workshop document proceedings to IPG-TWG (draft)	Strategic Plan and workshop document proceedings presented during IPG-TWG regular meeting													
Submission of final deliverables after 1 revision	Workshop documentation /final report submitted, approved, and accepted by the IPG-TWG													

VII. Source of Funds

Funding of the project is allocated from the IPG 2021 WFP fund amounting to **PHP300,000.00** inclusive of all applicable government taxes, professional fees, and administrative costs such as notarial and printing of output.

VIII. Mode of Procurement and Approved Budget for the Contract (ABC)

The procurement process for this undertaking shall be executed under Republic Act (RA) No. 9184, otherwise known as the Government Procurement Reform Act (GPRA) and its Revised Implementing Rules and Regulations (IRR) following **Negotiated Procurement - Small Value Procurement (SVP)**.

The ABC for the Strategic Planning Workshop undertaking is **THREE HUNDRED THOUSAND PESOS (PHP300,000.00)** inclusive of all applicable government taxes and professional fees, and administrative costs such as notarial and printing of output.

Note that this contract shall be a fixed price contract; however, shall be paid in terms of delivery of outputs/ deliverables. Any extension justified and approved by both parties shall not involve any additional cost to the RDC CALABARZON.

IX. Modalities for Contract and Payments

The Consulting Fee is payable for a total package cost of **THREE HUNDRED THOUSAND PESOS (PHP300,000.00)**. Payment shall be paid in 4 tranches scheduled as follows upon submission and acceptance of the specified deliverables by the IPG-TWG and endorsement of payment by DTI Region 4A to NEDA Region 4A:

1. An initial payment of **10%** for mobilization fee upon receipt of Notice of Award (Requirement: Standby Letter of Credit amounting to equal of the advance payment)
2. **10%** upon submission of the Workshop design, pre-workshop template, and moderation plan approved by IPG-TWG during the pre-consultation meeting
3. **50%** upon completion of facilitation/conduct of the Strategic Planning Workshop for five (5) days via an online platform and submission of filled-out pre-workshop templates from all participants
4. **30%** upon submission of the final copy of Strategic Plan with Analysis, Interpretation, Conclusions/Recommendations containing Vision, Mission, and Goals; Investment Promotion Programs for CALABARZON, Strategies and Work Plan for Investment Promotion and Action Plan for each priority industries (softcopy of editable PowerPoint and Word format and printed copies); and Workshop documentation/proceedings (softcopy of editable Word format and printed copies).

X. Application

Applications should contain an expression of interest together with the required supporting documents to undertake the work (*Please see the list*).

REQUIRED DOCUMENTS FOR SUBMISSION (c/o NEDA):

- PhilGEPS registration
- SEC or DTI Registration
- Mayor's/Business Permit
- Income/Business Tax Return
- Omnibus Sworn Statement
- Company Profile
- Curriculum Vitae of the Consultants
- List of ongoing and completed private and government contracts for similar projects over the past 3 years (via face-to-face and online platform)
- List of clients (with a contact person and contact number), services rendered, and contract amount (local and/or international)
- Positive ratings/feedback from previous clients
- Proposal
- Other documents that may be needed

XI. Ownership

The RDC CALABARZON, through the NEDA Region IV-A Secretariat, will own rights to the outputs of the Strategic Planning Workshop including, but not limited to, documents, reports, database system, among others, submitted by the consultant, which include exclusive right to publish the findings. The consultant/consultancy firm will be properly acknowledged by

RDC CALABARZON as the expert of the undertaking. Copyrights will be governed by existing laws, rules, and regulations.

XII. Liquidated Damages

Where the consultant/consultancy firm refuses or fails to satisfactorily complete the work within the specified contract time, plus any time extension duly granted and is hereby in default under the contract, RDC CALABARZON through the NEDA Region IV-A Secretariat shall, without prejudice to its other remedies under the contract and other applicable law, deduct from the contract price, as liquidated damages, a sum equivalent to one-tenth (1/10) of one percent (1%) of the price of the unperformed portion of the services for each day of delay based on the approved contract schedule.

Should the amount of liquidated damages reach 10% of the contract amount, RDC CALABARZON through the NEDA Region IV-A Secretariat shall at its discretion terminate the contract without prejudice to any further action it may take to recover whatever losses incurred due to the non-performance of the Consulting Firm.

XIII. Other Provisions

In the matter of dispute, should any dispute related to the Contract and/or Rights of the parties, arise, the same shall be submitted to mutual consultations, mediation, and arbitration, in the order of application. The venue of the proceedings shall be in Calamba City, Laguna.

In case of a court suit, the venue shall be the courts of competent jurisdiction in Calamba City, to the exclusion of all other courts; and any amendment or additional terms and conditions to the Contract must be in writing, signed, and acknowledged by the Parties.

If the Consulting Firm is found liable for any damages or failure to deliver its services under this TOR, the Consulting Firm agrees that any obligations and liabilities that may arise shall not involve RDC CALABARZON through the NEDA Region IV-A Secretariat.

By submitting a proposal, the consultant will adhere to the entirety of this TOR.

OMNIBUS SWORN STATEMENT

REPUBLIC OF THE PHILIPPINES)
CITY/MUNICIPALITY OF _____) S.S.

AFFIDAVIT

I, *[Name of Affiant]*, of legal age, *[Civil Status]*, *[Nationality]*, and residing at *[Address of Affiant]*, after having been duly sworn in accordance with the law, do hereby depose and state that:

1. **Select one, delete the other:**

If a sole proprietorship: I am the sole proprietor or authorized representative of *[Name of Consultant]* with office address at *[address of Consultant]*;

If a partnership, corporation, cooperative, or joint venture: I am the duly authorized and designated representative of *[Name of Consultant]* with office address at *[address of Consultant]*;

2. **Select one, delete the other:**

If a sole proprietorship: As the owner and sole proprietor or authorized representative of *[Name of Consultant]*, I have full power and authority to do, execute and perform any acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for *[Name of the Project]* of the *[Name of the Procuring Entity]* *[insert “as shown in the attached duly notarized Special Power of Attorney” for authorized representative]*;

If a partnership, corporation, cooperative, or joint venture: I am granted full power and authority to do, execute and perform any acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for *[Name of the Project]* of the *[Name of the Procuring Entity]*, accompanied by the duly notarized Special Power of Attorney, Board/Partnership Resolution, or Secretary’s Certificate, whichever is applicable;

3. *[Name of Consultant]* is not “blacklisted” or barred from bidding by the Government of the Philippines or any of its agencies, offices, corporations, or Local Government Units, foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board;

4. Each of the documents submitted in satisfaction of the bidding requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct;
5. *[Name of Consultant]* is authorizing the Head of the Procuring Entity or its duly authorized representative(s) to verify all the documents submitted;

6. **Select one, delete the rest:**

If a sole proprietorship: The owner or sole proprietor is not related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

If a partnership or cooperative: None of the officers and members of *[Name of Bidder]* is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

If a corporation or joint venture: None of the officers, directors, and controlling stockholders of *[Name of Consultant]* is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

7. *[Name of Consultant]* complies with existing labor laws and standards; and
8. *[Name of Consultant]* is aware of and has undertaken the following responsibilities as a Bidder:
 - a) Carefully examine all of the Bidding Documents;
 - b) Acknowledge all conditions, local or otherwise, affecting the implementation of the Contract;
 - c) Estimated the facilities available and needed for the contract to be bid, if any; and
 - d) Inquire or secure Supplemental/Bid Bulletin(s) issued for the *[Name of the Project]*.
9. *[Name of Bidder/Consultant]* did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel, or representative of the government about any procurement project or activity.
10. In case advance payment was made or given, failure to perform or deliver any of the obligations and undertakings in the contract shall be sufficient grounds to constitute criminal liability for Swindling (Estafa) or the commission of fraud with unfaithfulness or abuse of confidence through misappropriating or converting any payment received

Technical Proposal Forms

Notes for Consultants

The following summarizes the content and the maximum number of pages permitted for the Technical Proposal. A page is considered to be one printed side of A4 or letter-sized paper.

Cover Letter

Use TPF 1. Technical Proposal Submission Form.

Experience of the Firm

Maximum of *[insert an acceptable number of pages]* introducing the background and general experience of the Consultant, including its partner(s) and sub-consultants, if any.

Maximum of *[insert an acceptable number of pages]* completed projects in the format of TPF 2. Consultant's References illustrating the relevant experience of the Consultant, including its partner and sub-consultants, if any. No promotional material should be included.

General approach and methodology, work and staffing schedule

Use TPF 4. Description of the Methodology and Work Plan for Performing the Project, TPF 5. Team Composition and Task, TPF 7. Time Schedule for Professional Personnel.

If subcontracting is allowed, add the following: If the Consultant will engage a sub-consultant for the portions of the Consulting Services allowed to be subcontracted, the Consultant shall indicate which portions of the Consulting Services will be subcontracted, identify the corresponding subconsultant, and include the legal eligibility documents of such sub-consultant.

Curriculum Vitae (CV)

Use TPF 6. Format of Curriculum Vitae (CV) for Proposed Professional Staff

Comments on the terms of reference and data and facilities to be provided by the Procuring Entity

Not more than *[insert an acceptable number of pages]* using TPF 3. Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be provided by the Procuring Entity.

TPF 1. Technical Proposal Submission Form

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for *[Title of Project]* under your Proposal/Bidding Documents dated *[insert date]* and our Proposal/Bid. We are hereby submitting our Proposal/Bid, which includes this Technical Proposal, and a Financial Proposal sealed under a separate envelope.

We confirm that the information contained in the eligibility documents submitted together with the Expression of Interest remains correct as of the date of proposal/bid submission.

If negotiations are held during the period of proposal/bid validity, *i.e.*, before *[insert date]*, we undertake to negotiate based on the proposed staff. Our Proposal/Bid is binding upon us and subject to the modifications resulting from contract negotiations.

We acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Proposal/Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Proposal/Bid or not.

We understand you are not bound to accept any Proposal/Bid received for the selection of a consultant for the Project.

We acknowledge that failure to sign this Technical Proposal Submission Form and the abovementioned Financial Proposal Submission Form shall be a ground for the rejection of our Proposal/Bid.

Yours sincerely,
Authorized Signature:
Name and Title of Signatory:
Name of Firm:
Address:

TPF 2. Consultant's References

Relevant Services Carried Out That Best Illustrate Qualifications

Using the format below, provide information on each project for which your firm/entity, either individually, as a corporate entity, or as one of the major companies within an association, was legally contracted.

Project Name:		Country:
Location within Country:		Professional Staff Provided by Your Firm/Entity(profiles):
Name of Client:		No of Staff:
Address:		No of Staff -Months; Duration of Project:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of Services (in Current US\$):
Name of Associated Consultants, if any:		No of Months of Professional Staff Provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:		
Narrative Description of Project:		
Description of Actual Services Provided by Your Staff:		

Consultant's Name: _

TPF 3. Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be provided by the Procuring Entity

On the Terms of Reference:

- 1.
- 2.
- 3.
- 4.
- 5.

On the data, services, and facilities to be provided by the Procuring Entity:

- 1.
- 2.
- 3.
- 4.
- 5.

TPF 4. Description of the Methodology and Work Plan for Performing the Project

TPF 5. Team Composition and Task

1. Technical/Managerial Staff		
Name	Position	Task

2. Support Staff		
Name	Position	Task

3 Where applicable, indicate relationships among the Consultant and any partner and/or subconsultant, the Procuring Entity, the Funding Source, and other parties or stakeholders.

TPF 6. 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 the project (in months and years with detailed description/discussion on the nature and scope of work). Describe the degree of responsibility held by a 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 members since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience (actual number of man-months of engagement over duration in year/s and/or month/s), also indicate role played and types of activities performed and client references, where appropriate. Failure to indicate details of role and engagement (actual number of man-months of engagement over duration in year/s and/or month/s) shall merit zero points.]]

Training Attended:

[Summarize training/seminars attended as participant indicating topic and specific duration (in hours/days). Failure to indicate details shall merit zero points. Use about one-quarter of a page.]

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 working for the Project under the schedule as indicated in the contract once the firm is awarded the Project.

_____ Date: _____
[Signature of the staff member and authorized representative of the firm] 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 were/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 _____.

TPF 7. Time Schedule for Professional Personnel

Name	Position	Reports Due/Activities	Months (in the Form of a Bar Chart)												Number of Months	
			1	2	3	4	5	6	7	8	9	10	11	12		
																Subtotal (1)
																Subtotal (2)
																Subtotal (3)
																Subtotal (4)

Full-time: _____
 Reports Due: _____
 Activities Duration: _____
 Location _____

Part-time: _____

 Signature: _____
 (Authorized representative)

Full Name: _____
 Title: _____
 Address: _____

TPF 8. Activity (Work) Schedule

A. Field Investigation and Study Items

	<i>[1st, 2nd, etc. are months from the start of the project.]</i>												
	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	
Activity (Work)													

B. Completion and Submission of Reports

Reports/Deliverables		Date
Pre-Consultation	1.	
Pre-Workshop	1.	
Actual Workshop	1.	
Actual Workshop	1.	

Financial Proposal Forms

Notes for Consultants

The following summarizes the content of the Financial Proposal.

Cover Letter

Use FPF 1. Financial Proposal Submission Form, which is an acknowledgment that, in preparation and submission of the Technical and Financial Proposals, Consultants have:

- (a) followed the applicable rules and guidelines indicated in this RFP;
- (b) not take any action which is or constitutes a corrupt, fraudulent, or coercive practice as defined in the applicable rules and guidelines; and
- (c) agrees to allow the Procuring Entity and the Funding Source, at their option, to inspect and audit all accounts, documents, and records relating to its Proposal/Bid and the performance of the ensuing contract.

Costs of Consulting Services

Use FPF 2. Summary of Costs; FPF 3. Breakdown of Price per Activity
; FPF 4. Breakdown of Remuneration per Activity; FPF 5. Reimbursable per Activity
; and FPF 6. Miscellaneous Expenses.

REMINDERS:

- (a) Consultants are advised to follow the instructions below in filling out the FPFs

FPF 1	Indicate the base financial proposal and the estimated taxes in word and figure
FPF 2	The amounts, i.e., base financial proposal and local taxes, must be consistent with the amounts indicated in FPF 1
FPF 3 to FPF 6	Indicate both the base proposal and its corresponding local taxes

- (b) Ensure that all amounts in the FPFs are consistent and should not exceed the ABC.

FPF 1. FINANCIAL PROPOSAL SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for *[Title of Project]* under your Bidding Documents dated *[insert date]* and our Bid (Technical and Financial Proposals). Our attached Financial Proposal is for the sum of the *amount in words and figures⁴*. This amount is **exclusive** of the local taxes, which we have estimated at *[amount(s) in words and figures⁵]*.

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to the expiration of the bid validity period⁶, *i.e.*, *[Date]*.

We acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our proposal/bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this proposal/bid.

We confirm that we have read, understood, and accept the contents of the Request for Proposal (RFP) and Terms of Reference (TOR), the provisions relating to the eligibility of Consultant and the applicable guidelines for the procurement rules of the Funding Source, any Bid bulletins issued and other attachments and inclusions included in the Bidding Documents sent to us.

We understand you are not bound to accept any Bid you receive.

Yours sincerely,
Authorized Signature:
Name and Title of Signatory:
Name of Firm:
Address:

⁴ Indicate the amount of Base Financial Proposal. Bidder should indicate base financial proposal in **words and in figures**.

⁵ Indicate the amount of Estimated Local Taxes in **words and in figures**.

⁶ Note: Section 28.1 of the 2016 Revised IRR of RA 9184

FPP 2. Summary of Costs⁷

Costs	Currency(ies) ⁸	Amount in Philippine Peso
Subtotal/Base Financial Proposal		
Local Taxes		
Total Amount of Financial Proposal		_____

FPF 3. Breakdown of Price per Activity⁹

Activity No.: _____	Activity No.: _____	Description: _____
Price Component	Currency(ies) ¹⁰	Amount in Philippine Peso
Remuneration Reimbursable Miscellaneous Expenses Subtotal		_____

⁹ *Include amounts for local taxes*

¹⁰ In cases of contracts involving foreign, consultants, indicate the exchange rate used.

FPF 4. Breakdown of Remuneration per Activity¹¹

Activity No. _____		Name: _____		
Names	Position	Input ¹²	Remuneration Currency(ies) Rate	Amount
Regular staff Local staff Consultants Grand Total				_____

¹¹ *Include amounts for local taxes*

¹² Staff months, days, or hours as appropriate.

FPF 5. Reimbursable per Activity¹³

Activity No: _____

Name: _____

No.	Description	Unit	Quantity	Unit Price In	Total Amount In
1.	International flights _____	Trip			
2.	Miscellaneous travel expenses	Trip			
3.	Subsistence allowance	Day			
4.	Local transportation costs ¹⁴				
5.	Office rent/accommodation/ clerical assistance				
	Grand Total				_____

¹³ **Include amounts for local taxes**

¹⁴ Local transportation costs are not included if local transportation is being made available by the Entity. Similarly, in the project site, office rent/accommodations/clerical assistance costs are not to be included if being made available by the Entity.

FPF 6. Miscellaneous Expenses¹⁵

Activity No. _____

Activity Name: _____

No.	Description	Unit	Quantity	Unit Price	Total Amount
1.	Communication costs between _____ and (telephone, telegram, telex) Drafting, reproduction of reports				
2.	Equipment: vehicles, computers, etc. Software				
3.	Grand Total				
4.					_____

¹⁵ *Include amounts for local taxes*

Sample Templates for FPF1 and FPF2

FPF 1. FINANCIAL PROPOSAL SUBMISSION FORM

1 February 2022

***CALABARZON Regional Development Council through the
National Economic and Development Authority Region IV-A
Barangay Milagrosa (Tulo), Calamba City Laguna***

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services ***to facilitate the Conduct of the Strategic Planning Workshop*** under your Bidding Documents dated ***January 12, 2022***, and our Bid (Technical and Financial Proposals). Our attached Financial Proposal is for the sum of ***Three Hundred Thousand Pesos (PhP300,000.00)***. This amount is exclusive of the local taxes, which we have estimated at ***Fifty-Three Thousand Five Hundred Seventy-One Pesos and 43/100 (PhP53,571.43)***.

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to the expiration of the bid validity period¹⁶, *i.e.*, ***June 1, 2022***

We acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our proposal/bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this proposal/bid.

We confirm that we have read, understood, and accept the contents of the Request for Proposal (RFP) and Terms of Reference (TOR), the provisions relating to the eligibility of Consultant and the applicable guidelines for the procurement rules of the Funding Source, any Bid bulletins issued and other attachments and inclusions included in the Bidding Documents sent to us.

We understand you are not bound to accept any Bid you receive.

Yours sincerely,

Mr. Juan Dela Cruz
(signature above name)
President

¹⁶ Note: Section 28.1 of the 2016 Revised IRR of RA 9184

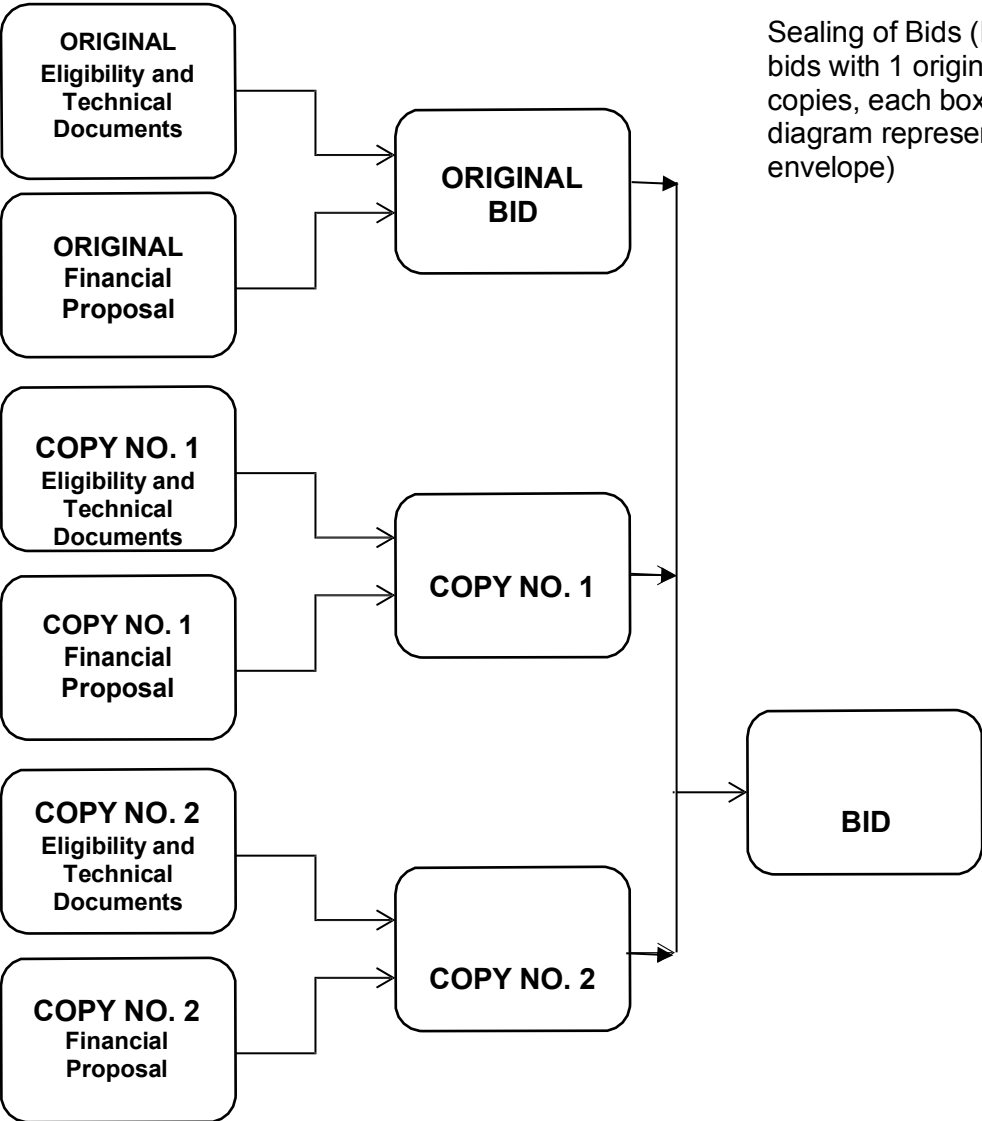
**ABC Consultancy
Pasig City**

FPF 2. Summary of Costs

Costs	Currency(ies) ¹⁷	Amount in Philippine Peso
Subtotal/Base Financial Proposal		300,000.00
Local Taxes		53,571.43
Total Amount of Financial Proposal		246,428.57

¹⁷ In cases of contracts involving foreign consultants indicate the exchange rate used.

Annex F



Sealing of Bids (Illustration of bids with 1 original and 2 copies, each box in the diagram represents a sealed envelope)