



**National Development Company**



**ELIGIBILITY DOCUMENTS  
FOR THE SECOND (2<sup>ND</sup>) PUBLIC BIDDING  
OF THE**

**PROCUREMENT OF CONSULTING SERVICES FOR  
THE PREPARATION AND IMPLEMENTATION OF A  
STAKEHOLDER SATISFACTION EVALUATION OF  
NDC'S OVERALL PERFORMANCE AS AN  
INVESTMENT PARTNER, CLIENT AND LESSOR**

**PROJECT REFERENCE NO:**

**BAC16-04-048**

**APPROVED BUDGET:**

**₱ 800,000.00**

NDC Building, 116 Tordesillas Street  
Salcedo Village, Makati City



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## REQUEST FOR EXPRESSION OF INTEREST

### **PROCUREMENT OF CONSULTING SERVICES FOR THE PREPARATION AND IMPLEMENTATION OF A STAKEHOLDER SATISFACTION EVALUATION OF NDC'S OVERALL PERFORMANCE AS AN INVESTMENT PARTNER, CLIENT AND LESSOR (2<sup>ND</sup> BIDDING)**

1. The National Development Company (NDC), through the Approved NDC's Corporate Operating Budget for the Year 2016, intends to apply the sum of **EIGHT HUNDRED THOUSAND PESOS (PHP800,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor with Project Reference No. BAC16-04-048. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The NDC now calls for the submission of eligibility documents for the Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor.
3. The Consultant's scope of services shall cover the following aspects:

The Consulting Services required shall be for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor. The target number of respondents is 35 to 45 key personnel representing the mix of current primary stakeholders of NDC. Each set of respondents are either the complete members of their category or a sample of NDC primary stakeholders.

The Consultant is expected to do/come up with the following:

- a. Identify/develop the following in consultation with all concerned NDC workgroups:
  1. Factors affecting satisfaction of each workgroup's stakeholders which shall be used as parameters of overall NDC performance.
  2. Appropriate research methodology, type of data (quantitative and qualitative) for each set of respondents.
  3. Scale or appropriate metric system for satisfaction and performance indicators/factors.
  4. Research instruments such as but not limited to survey questionnaires, Key Informant Interviews (KII) and/or Focus Group Discussions (FGD) guide questions. The questions shall focus on measures of NDC stakeholder satisfaction, in accordance with NDC's performance agreement with the Governance Commission for GOCCs (GCG) and in compliance with the requirements of the Performance Governance System (PGS) and ISO 9001 mandatory procedures.
- b. Coordinate, manage, implement and facilitate quantitative and qualitative data collection using all identified/approved methodology and evaluation instruments. All concerned NDC workgroups may provide assistance during the scheduling of appointments in the data gathering phase;

- c. Analyze, prepare and submit the results of the stakeholder satisfaction evaluation study, data gathering instruments used, complete transcripts, presentation materials and all reports, in both hard and soft copies, related to conduct of interviews/consultation from the initial discussions with NDC up to the results and recommendations of the study;
  - d. Provide recommendations on how to improve NDC performance and increase the overall level of stakeholder satisfaction. Recommendations shall be supported by the triangulation of quantitative and qualitative information gathered or correlation of various methodologies implemented in the study;
  - e. To present and discuss the following to NDC officers or representatives:
    1. Inception report (indicators/factors, tools, and methodology)
    2. Stakeholder Satisfaction Evaluation results and recommendations
4. The Eligibility Documents will be available at the NDC Cashier, 7<sup>th</sup> Floor, NDC Building, 116 Tordesillas St., Salcedo Village, Makati City from 9:00 am to 4:00 pm on **July 22 – August 10, 2016** and from 9:00 am to 10:00 am only on **August 11, 2016**. The Eligibility Documents can be availed of upon submission of Letter of Interest and upon payment of a non-refundable amount of One Thousand Pesos (*PhP1,000.00*). The method of payment will be cash or cashier’s check/manager’s check.
  5. A Pre-Eligibility Conference for the discussion of the Eligibility Documents will be conducted on **July 29, 2016 at 2:00 pm** at the ABB Hall, NDC Building, 116 Tordesillas St., Salcedo Village, Makati City.
  6. Interested consultants must submit their Eligibility Documents on or before **August 11, 2016 at 10:00 am** (7<sup>th</sup> Floor NDC Clock) at the 7<sup>th</sup> Floor, NDC Building, 116 Tordesillas St., Salcedo Village, Makati City. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion. The opening of Eligibility Documents is on **August 11, 2016 at 10:30 am** at the ABB Hall, NDC Building, 116 Tordesillas St., Salcedo Village, Makati City.
  7. The interested consultant must be registered online with the Philippine Government Electronic Procurement System (<http://www.philgeps.net/>) as a legitimate service provider for government requirements.
  8. The NDC Bids and Awards Committee (NDC-BAC) shall draw up the short list of consultants from those who have submitted Eligibility Documents/Expression of Interest 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).
  9. The minimum qualifications of the consultancy firm are the following:
    - a. Must be a reputable firm with adequate experience in the methodologies of research and development with at least ten (10) years of consultancy business operation;
    - b. Must have completed at least five (5) studies/projects in the conduct of satisfaction evaluation and five (5) other studies/projects related in nature with the subject project;
    - c. The evaluation team must be aware of the functions of the Governance Commission for GOCCs (GCG) and should have proven expertise on the demands of Performance Governance System (PGS) and ISO 9001 standards with regards to measurement and analysis of stakeholder satisfaction. At the minimum, the members of the evaluation team should consist of the following:

<b>Designation</b>	<b>Minimum Qualifications</b>
Lead Evaluator & Interviewer (1)	Five (5) years relevant experience in

	planning, design, management and implementation of stakeholder satisfaction evaluation studies and with at least a bachelor of science degree, preferably in business, statistics or economics
Statistician & Data Processor (1)	Five (5) years experience in the design of socio-economic evaluation and with at least a bachelor of science degree, preferably in statistics or economics
Enumerator / Interviewer (at least 2)	Participated in at least one (1) project in conducting interviews, survey, and/or Focus Group Discussions

10. The criteria and rating system for short listing of consultants are as follows:

<u>Criteria</u>	<u>Perfect Score</u>
Firm's work experience on Stakeholder Satisfaction Survey and related studies within the last 10 years (2005-2015) with a total of at least 10 projects (5 similar and 5 related) completed, with amounts of not less than Php 400,000 for each project	35%
Technical and managerial capacity to do additional work other than those currently being undertaken	25%
Firm's work experience on specific activities of the project at hand	40%
<b>TOTAL</b>	<b>100%</b>

The Consultant(s) must pass the required minimum score of seventy percent (70%) to be shortlisted. The shortlist shall consist of a maximum of five (5) prospective bidders who will be entitled to submit bids.

11. Bidding Documents will be available only to shortlisted bidders upon payment of a non-refundable amount of One Thousand Pesos (*PhP1,000.00*).
12. 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 open to all interested bidders, subject to the conditions for eligibility provided in the IRR of RA 9184.
13. The schedule of activities is listed as follows:

<u>Activities</u>	<u>Schedule</u>	<u>Venue</u>
Issuance of Eligibility Documents and Submission of Letters of Intent and Application for Eligibility	July 22 – August 10, 2016 (9:00 am – 4:00 pm) August 11, 2016 (9:00 am - 10:00 am)	NDC Cashier, 7th Floor, NDC Building
Pre-Eligibility Conference for the Discussion of Eligibility Documents	July 29, 2016 (2:00 pm)	ABB Hall, NDC Building

Deadline for Submission of Eligibility Documents	August 11, 2016 (10:00 am)	7th Floor, NDC Building
Opening of Eligibility Documents and Eligibility Check	August 11, 2016 (10:30 am)	ABB Hall, NDC Building
Issuance of Bidding Documents to Shortlisted Consultants	August 26 – September 16, 2016 (9:00 am – 4:00 pm) September 19, 2016 (8:00 am – 9:00 am)	NDC Cashier, 7th Floor, NDC Building
Pre-bid Conference	September 5, 2016 (2:00 pm)	ABB Hall, NDC Building
Deadline for Submission of Technical and Financial Proposals	September 19, 2016 (9:00 am)	7th Floor, NDC Building
Opening and Preliminary Examination of Technical Proposals	September 19, 2016 (10:00 am)	ABB Hall, NDC Building
Evaluation of Bids (Technical Proposals)	September 20 – 26, 2016	8th Floor, NDC Building
Opening and Preliminary Examination of Financial Proposals	September 30, 2016 (2:00 pm)	ABB Hall, NDC Building
Evaluation of Bids (Financial Proposals)	October 3 – 10, 2016	8th Floor, NDC Building
Post-Qualification	October 20 – 26, 2016	8th Floor, NDC Building
Issuance of Notice of Award	November 2, 2016	Thru fax, mail or delivery

14. The NDC shall evaluate bids using the Quality-Cost Based Evaluation (QCBE) Procedure. The technical proposal and financial proposal shall be given weights of 70% and 30%, respectively. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
15. The contract shall be completed within 40 calendar days from receipt of the Notice to Proceed. A detailed schedule of work and activity plan shall be prepared and submitted together with the Consultant's Proposal.
16. NDC reserves the right to reject any and all bids, annul the bidding process, or not award the contract at any time prior to contract award, without thereby incurring any liability to the affected bidder or bidders.
17. For further information, please refer to:  
**MR. ROMMEL R. SERRANO**  
Head, BAC Secretariat  
National Development Company  
8<sup>th</sup> Floor, NDC Building, 116 Tordesillas St., Salcedo Village, Makati City  
Tel. Nos.: (02) 840-4838 to 47 local 256 Fax No.: (02) 840-4862  
E-mail Address: [rserrano@ndc.gov.ph](mailto:rserrano@ndc.gov.ph) NDC website: [www.ndc.gov.ph](http://www.ndc.gov.ph)

**(Sgd.) AGM LILIA L. ARCE**  
NDC BAC Chairman

## **TERMS OF REFERENCE**

### **Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor (2<sup>nd</sup> Bidding)**

#### **I. BACKGROUND:**

The National Development Company (NDC), a government-owned and controlled corporation and an attached agency of the Department of Trade and Industry (DTI), functions as the government's investment arm. It develops, finances and implements pioneering development-oriented projects vital to the sustainability of the government's structural reforms and economic policies in partnership with other investors from either the public or private sector.

Given this mandate, NDC as a whole or both NDC's core and support groups' performances are monitored through performance indicators based on their respective annual strategic objectives and measures.

Foremost among these indicators are measurements of how NDC fared in terms of its performance from the perspective of its subsidiary/affiliate companies, partners, new project proponents, consultants, service providers, suppliers and lessees.

Therefore, as part of NDC's commitment to transparency, accountability and good governance, a Stakeholder Satisfaction Evaluation shall be conducted.

#### **II. OBJECTIVES:**

The general objective of the study is to get feedback and measure, using quantitative and qualitative information, the satisfaction of primary stakeholders on NDC's overall performance as an investment partner, client and lessor.

In accordance with NDC's performance commitments with the Governance Commission for GOCCs (GCG), compliance with the requirements of the Performance Governance System (PGS) and compliance to ISO 9001 mandatory procedures, the specific objectives of the study are the following:

1. Measure the primary stakeholders' (composed of NDC subsidiary/affiliate companies, partners, new project proponents, consultants, service providers, suppliers and lessees) rating of NDC overall performance to be at least satisfactory (Target: 100%).
2. Evaluate NDC performance using (but not limited to) the following factors:
  - a. Timeliness
  - b. Competence and effectiveness of personnel
  - c. Participation of NDC personnel

- d. Behavior and conduct of personnel
- e. Efficiency (simplicity of processes, clarity of procedures)
- f. Transparency and fairness
- g. Overall ease of transacting with NDC

### **III. SCOPE OF WORK:**

The assessment will involve the design, preparation, coordination, implementation and presentation of Stakeholder Satisfaction Evaluation using quantitative and qualitative information gathered through Survey, Key Informant Interviews (KII) and/or Focus Group Discussions (FGD).

The target number of respondents is 35 to 45 key personnel representing the mix of current primary stakeholders of NDC. Each set of respondents are either the complete members of their category or a sample of NDC primary stakeholders.

The evaluation team is expected to do/come up with the following:

1. Identify/develop the following in consultation with all concerned NDC workgroups:
  - a. Factors affecting satisfaction of each workgroup's stakeholders which shall be used as parameters of overall NDC performance.
  - b. Appropriate research methodology, type of data (quantitative and qualitative) for each set of respondents.
  - c. Scale or appropriate metric system for satisfaction and performance indicators/factors.
  - d. Research instruments such as but not limited to survey questionnaires, KII and/or FGD guide questions. The questions shall focus on measures of NDC stakeholder satisfaction, in accordance with NDC's performance agreement with the Governance Commission for GOCCs (GCG) and in compliance with the requirements of the Performance Governance System (PGS) and ISO 9001 mandatory procedures.
2. Coordinate, manage, implement and facilitate quantitative and qualitative data collection using all identified/approved methodology and evaluation instruments. All concerned NDC workgroups may provide assistance during the scheduling of appointments in the data gathering phase;
3. Analyze, prepare and submit the results of the stakeholder satisfaction evaluation study, data gathering instruments used, complete transcripts, presentation materials and all reports, in both hard and soft copies, related to conduct of interviews/consultation from the initial discussions with NDC up to the results and recommendations of the study;
4. Provide recommendations on how to improve NDC performance and increase the overall level of stakeholder satisfaction. Recommendations shall be supported by the triangulation of quantitative and qualitative information gathered or correlation of various methodologies implemented in the study;
5. To present and discuss the following to NDC officers or representatives:



- a. Inception report (indicators/factors, tools, and methodology)
- b. Stakeholder Satisfaction Evaluation results and recommendations

#### **IV. EXPECTED OUTPUT**

The evaluation team is expected to submit all reports in the following formats:

1. 1 printed copy (signed or certified by the consultant)
2. DVD or USB containing soft/electronic copies of the report, transcripts, and all attachments in MS Word file/format and the presentation materials in MS Power Point file/format.

The reports (submitted in the abovementioned formats) shall include the following:

1. Inception report

(To be submitted within 7 days after consultations with all concerned NDC workgroups and presentation to NDC officers/representatives)

This covers the details of the Study (methods, survey instrument, KII/FGD guide questions, identified respondents, schedule of interviews, materials/equipment, and other requirements for the conduct of the study).

2. Draft Report/ Results of the study

(To be submitted, presented and discussed with NDC management within 15 days after the interview of the last respondent)

This covers the detailed report on the status, comments, issues and recommendation gathered from the interview regarding stakeholder satisfaction on NDC performance in terms of the factors identified/approved in the inception phase.

3. Final Report

(To be submitted within three (3) days after the presentation of Draft Report to NDC)

This covers all components of the draft report including corrections, comments, additional write-up/recommendations, answers to questions and other details given/required by NDC during the presentation of the Draft Report.

4. Documentation reports on the conduct of interviews/consultation

(To be included as attachments to the Final Report)

This report provides documents used during all activities undertaken starting the initial discussion with NDC up to the results and

recommendations from the study. This includes copies of all materials used for the conduct of the study and the transcripts (as edited by the consultant) of all interviews with the respondents.

#### V. TIMETABLE (To be implemented within November to December 2016)

Activities	Number of Days	Expected Output
Consultation with NDC workgroups	3	
Inception Report or proposal writing and submission	7	<b>Inception Report</b> (includes survey instruments, KII/FGD guide questions, indicators/ parameters/ factors, evaluation framework and detailed methodology)
Data Collection	10	
Data Processing/analysis and draft report preparation	15	
Presentation of results	1	<b>Draft report</b> on results of the study and presentation materials
Revisions writing and Final Report Preparation	3	
Submission of Final Report	1	<b>Final Report</b> (includes attachments and <b>documentation report</b> )

#### VI. QUALIFICATIONS

The consultancy firm must have adequate experience in the methodologies of research and development with **at least ten (10) years** of consultancy business operation and have completed at least **five (5) studies/projects** in the conduct of satisfaction evaluation and **five (5) other studies/projects** related in nature with the subject project.

The evaluation team must be aware of the functions of the GCG and should have proven expertise on the demands of Performance Governance System (PGS) and ISO 9001 standards with regards to measurement and analysis of stakeholder satisfaction. At the minimum, the members of the evaluation team should consist of the following:

Designation	Minimum Qualifications
Lead Evaluator & Interviewer (1)	Five (5) years relevant experience in planning, design, management and implementation of stakeholder satisfaction evaluation studies and with at least a bachelor of science degree, preferably in

	business, statistics or economics
Statistician & Data Processor (1)	Five (5) years experience in the design of socio-economic evaluation and with at least a bachelor of science degree, preferably in statistics or economics
Enumerator / Interviewer (at least 2)	Participated in at least one (1) project in conducting interviews, survey, and/or Focus Group Discussions

## VII. APPROVED BUDGET FOR THE CONTRACT

Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor has an Approved Budget for the Contract (ABC) of **PESOS: EIGHT HUNDRED THOUSAND (PHP 800,000.00)**, inclusive of VAT and all other applicable government taxes.

## VIII. EVALUATION PROCEDURE AND CRITERIA

The method of evaluation of bids shall be Quality-Cost Based Evaluation (QCBE) Procedure:

1. The criteria and rating system for short listing of consultants are as follows:
  - a. Firm's work experience on Stakeholder Satisfaction Survey and related studies within the last 10 years (2005-2015) with a total of at least 10 projects (5 similar and 5 related) completed, with amounts of not less than Php 400,000 for each project - 35%
  - b. Technical and managerial capacity to do additional work other than those currently being undertaken - 25%
  - c. Firm's work experience on specific activities of the project at hand - 40%

The consultant(s) must pass the required minimum score of 70% to be shortlisted. The shortlist shall consist of a maximum of five (5) prospective bidders who will be entitled to submit bids.

2. The criteria and rating system for the evaluation of the Technical and Financial Proposals:
  - a. Technical Proposal (70%)
  - b. Financial Proposal (30%)

## IX. MODE OF PAYMENT:

In consideration of the services required under this TOR, payment to the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor shall be made as follows:

1. Fifteen percent (15%) of the Contract Price for advance payment upon written request of the consultant and posting of an irrevocable standby

letter of credit issued by a Universal or Commercial Bank with an amount equal to the advance payment. The advance payment shall be offsetted from each subsequent payment.

2. Thirty percent (30%) of the Contract Price upon submission and approval by the owner of the Inception Report (includes survey instruments, KII/FGD guide questions, indicators/ parameters/ factors, evaluation framework and detailed methodology).
3. Forty percent (40%) of the contract price upon submission of the Draft Final Report on results of the study and presentation materials.
4. The remaining thirty percent (30%) of the Contract Price shall be released under the following conditions:
  - a. Submission of the Final Report (includes attachments and documentation report); and
  - b. Issuance of Certificate of Completion by NDC.

## **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 the laws of the Philippines, and of which at least sixty percent (60%) interest belongs to citizens of the Philippines; or
- e) 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 qualifications stated in the **EDS**.

1.4. Government corporate entities 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 dependent agencies of the GOP or the Procuring Entity.

### **2. Eligibility Requirements**

2.1. The following eligibility requirements 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) Registration certificate from Securities and Exchange Commission (SEC), Department of Trade and Industry (DTI) for sole proprietorship, or Cooperative Development Authority (CDA) for cooperatives, or any proof of such registration as stated in the **EDS**;
- ii) Mayor’s permit issued by the city or municipality where the principal place of business of the prospective bidder is located;
- iii) Tax clearance per Executive Order 398. Series of 2005, as finally reviewed and approved by the BIR.

Technical Documents

- iv) 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:
  - (iii.1) the name and location of the contract;
  - (iii.2) date of award of the contract;
  - (iii.3) type and brief description of consulting services;
  - (iii.4) consultant’s role (whether main consultant, subcontractor, or partner in a JV)
  - (iii.5) amount of contract;
  - (iii.6) contract duration; and
  - (iii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- v) 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.

Financial Documents

- vi) 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 bid submission.

b) Class “B” Documents

Valid joint venture agreement (JVA), in case a joint venture is already in existence. In the absence of a JVA, 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, shall be included in the bid. Failure to enter into a joint venture in the event of a contract award shall be ground for the forfeiture of the bid security. Each partner of the joint venture shall submit the legal eligibility documents. The submission of technical and financial documents by any of the joint venture partners constitutes compliance.

- 2.2. In the case of foreign consultants, the foregoing eligibility requirements under Class “A” Documents may be substituted by the appropriate equivalent documents, if any, issued by the foreign consultant’s country.
- 2.3. The eligibility requirements or statements and all other documents to be submitted to the BAC must be in English. A translation of the documents in English certified by the appropriate embassy or consulate in the Philippines must accompany the eligibility requirements under Classes “A” and “B” Documents if they are in other foreign language.
- 2.4. 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, subcontractors 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.
- 2.5. If a prospective bidder has previously secured a certification from the Procuring Entity to the effect that it has previously submitted the above-enumerated Class “A” Documents, the said certification may be submitted in lieu of the requirements enumerated in Clause 2.1 above.

### **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, except for unamended printed literature, shall be signed, and each and every page thereof shall be initialed, by the duly authorized representative/s of the prospective bidder.
- 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. Unless otherwise indicated in the **EDS**, prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked

“ORIGINAL – ELIGIBILITY DOCUMENTS”. Each copy 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 indelible 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. If the eligibility documents are not sealed and marked as required, the Procuring Entity will assume no responsibility for its misplacement or premature opening.

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

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 5 shall be declared “Late” and shall not be accepted by the Procuring Entity.

## **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 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. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project.

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

- 8.1. The Procuring Entity's 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.
- 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. If the withdrawing prospective bidder's representative is present during the opening, the original eligibility documents and all copies thereof shall be returned to the representative during the opening of eligibility documents. If no representative is present, the eligibility documents shall be returned unopened by registered mail.
- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:
  - a) the name of the prospective bidder;
  - b) whether there is a modification or substitution; and
  - c) 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 of the Procuring Entity 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 Letter of Invitation to Bid issued by the BAC of the Procuring Entity.
- 9.4. Only bids from short listed bidders shall be opened and considered for award of contract. These short listed bidders, whether single entities or JVs, should confirm in their bids that the information contained in the submitted eligibility documents remains correct as of the date of bid submission.

## **10. Protest Mechanism**

Decision of the procuring entity at any stage of the procurement process be questioned in accordance with Section 55 of the revised Implementing Rules and Regulations of Republic Act 9184.

## ELIGIBILITY DATA SHEET

<b>Eligibility Documents</b>	
1.2	<p>The evaluation team must be aware of the functions of the GCG and should have proven expertise on the demands of PGS and ISO 9001 standards with regards to measurement and analysis of stakeholder satisfaction. At the minimum, the members of the evaluation team should consist of the following:</p> <ul style="list-style-type: none"> <li>• Lead Evaluator &amp; Interviewer (1)</li> <li>• Statistician &amp; Data Processor (1)</li> <li>• Enumerator / Interviewer (at least 2)</li> </ul>
1.3	<p>Foreign consultants may be eligible to participate in this Project, subject to the following qualifications:</p> <ol style="list-style-type: none"> <li>1. must be registered with the SEC and/or any agency authorized by the laws of the Philippines;</li> <li>2. when the types and fields of consulting services in which the foreign consultant wishes to engage involve the practice of regulated professions, the foreign consultant must be authorized by the appropriate GOP professional regulatory body specified in Clause 1.2 to engage in the practice of those professions and allied professions: <i>Provided, however,</i> That the limits of such authority shall be strictly observed.</li> </ol>
2.1.a.i	No any other acceptable proof of registration is recognized
2.1.a.ii	Mayor's Permit issued by the city or municipality where the principal place of business of the prospective bidder is located must be valid for 2016.
2.1.a.iii	Valid Tax clearance per Executive Order 398. Series of 2005, as finally reviewed and approved by the BIR.
2.1.a.iv	<p>The statement of all ongoing and completed government and private contracts shall include all such contracts within the past ten (10) years prior to the deadline for the submission and receipt of eligibility documents (Please refer to the format attached as Annex A).</p> <p>To be attached to the statement is the summary of all the contracts undertaken within the past ten (10) years (please refer to Annex B), and copies of supporting documents as proof that the project has been undertaken by/awarded to the proponent. For completed projects in the <u>conduct of satisfaction evaluation</u>, at least two (2) studies/projects must have Certified True Copy of Certificate of Satisfactory Completion issued by the client. For completed projects which are <u>related in nature with the subject project</u>, at least two (2) of which must have Certified True Copy of Certificate of Satisfactory Completion issued by the client. Among the</p>

	<p>completed projects, at least 10 (5 similar and 5 related) should have a contract amount of at least Php 400,000 each.</p>
<p>2.1.a.v</p>	<p>The statement of the consultant confirming that those who will actually perform the service are professionals and meet the minimum qualification requirements (format is attached as Annex C). In addition, the Consultant shall submit a certified list of key in-house officers and personnel (see attached Annex C-1).</p> <p>NDC requires the consultant to create a project team composed of at least four (4) key personnel who shall work for the project. The key personnel and the required minimum qualification for each position are as follows (one personnel for each position) :</p> <p><b>1. Lead Evaluator &amp; Interviewer (1)</b></p> <ul style="list-style-type: none"> <li>- with at least a Bachelor of Science Degree, preferably in Business, Statistics or Economics</li> <li>- Five (5) years relevant experience in planning, design, management and implementation of stakeholder satisfaction evaluation studies.</li> </ul> <p><b>2. Statistician &amp; Data Processor (1)</b></p> <ul style="list-style-type: none"> <li>- with at least a Bachelor of Science Degree, preferably in Statistics or Economics</li> <li>- Five (5) years relevant experience in the design of socio-economic evaluation.</li> </ul> <p><b>3. Enumerator/Interviewer (at least 2)</b></p> <ul style="list-style-type: none"> <li>- Participated in at least one (1) project in conducting interviews, survey, and/or Focus Group Discussions.</li> </ul> <p>Each key personnel must submit his/her Curriculum Vitae (CV) which format is attached as Annex D.</p> <p>The proposed composition of the project team submitted during the eligibility screening / shortlisting, shall be the same composition of the project team to be evaluated during the bidding. Thus, substitution or replacement of personnel who have been nominated shall not be allowed.</p> <p>Failure of the consultant to assign the required key personnel and submit the personnel CVs shall be a ground not to consider it for shortlisting.</p> <p>The personnel shall certify that the data in his CV is correct and commit to work for the Project once the contract is awarded to the firm where he belongs.</p>

2.1.a.vi	<p>Bidder shall submit the 2015 Audited Financial Statements, stamped “received” by the BIR or its duly accredited institutions.</p> <p>Bidder shall include/attach the 2015 Annual Income Tax Return filed through its Electronic Filing and Payment System (EFPS).</p>
4.1 & 4.4	<p>Each prospective bidder shall submit one (1) Original or Certified True Copy and two (2) copies of its eligibility documents (Legal and Financial Documents). The original copy of the documents which cannot be submitted should be stamped and signed as “Certified True Copy of the Original” by the duly authorized representative of the bidder. All these eligibility documents shall be enclosed in one main envelope to be accompanied by <b>Eligibility Documents Submission Form</b> which format is attached as Annex E.</p> <p>Labeling and marking instructions:</p> <ol style="list-style-type: none"> <li>a. All documents should be properly tabbed and bound; and</li> <li>b. Envelope should bear the warning “DO NOT OPEN BEFORE (the date and time of opening of Bids).</li> </ol> <p>Illustration : Sample format of labeled envelope:</p> <p><b><u>ORIGINAL COPY – ELIGIBILITY DOCUMENTS</u></b></p> <p><b>LILIA L. ARCE</b>  Chairman  <b>NDC Bids and Awards Committee</b>  <b>National Development Company</b>  NDC Building, 116 Tordesillas St. Salcedo Village, Makati City</p> <p>Bid for: Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC’s Overall Performance as an Investment Partner, Client and Lessor (2<sup>nd</sup> Bidding)</p> <p>Submitted by: BIDDER’S COMPANY NAME  BIDDER’S CONTACT DETAILS</p> <p><b>DO NOT OPEN BEFORE: <u>10:30 am of August 11, 2016</u></b></p> <p><b><u>COPY 1 – ELIGIBILITY DOCUMENTS</u></b></p> <p><b>LILIA L. ARCE</b>  Chairman  <b>NDC Bids and Awards Committee</b>  <b>National Development Company</b>  NDC Building, 116 Tordesillas St.  Salcedo Village, Makati City</p> <p>Bid for: Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC’s Overall</p>

	<p>Performance as an Investment Partner, Client and Lessor (2<sup>nd</sup> Bidding)</p> <p>Submitted by: BIDDER'S COMPANY NAME BIDDER'S CONTACT DETAILS</p> <p><b>DO NOT OPEN BEFORE: <u>10:30 am of August 11, 2016</u></b></p> <p><b><u>COPY 2 – ELIGIBILITY DOCUMENTS</u></b></p> <p><b>LILIA L. ARCE</b> Chairman <b>NDC Bids and Awards Committee</b> <b>National Development Company</b> NDC Building, 116 Tordesillas St. Salcedo Village, Makati City</p> <p>Bid for: Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor (2<sup>nd</sup> Bidding)</p> <p>Submitted by: BIDDER'S COMPANY NAME BIDDER'S CONTACT DETAILS</p> <p><b>DO NOT OPEN BEFORE: <u>10:30 am of August 11, 2016</u></b></p>
4.3.c & 4.3.d	<p><b>LILIA L. ARCE</b> Chairman NDC Bids and Awards Committee National Development Company NDC Building, 116 Tordesillas St. Salcedo Village, Makati City</p> <p>Bid for: Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor (2<sup>nd</sup> Bidding)</p>
5	<p>The address for the submission of eligibility documents is:</p> <p><b>LILIA L. ARCE</b> Chairman – Bids and Awards Committee National Development Company 7<sup>th</sup> Floor NDC Building, 116 Tordesillas St. Salcedo Village, Makati City</p> <p>The deadline for submission of Eligibility Documents is on <b><u>August 11, 2016 at 10:00 am (7<sup>th</sup> Floor, NDC Clock).</u></b></p>

8.1	<ul style="list-style-type: none"> <li>• The place of opening of eligibility documents is at the ABB Hall, NDC Building 116 Tordesillas St., Salcedo Village, Makati City.</li> <li>• The date and time of the opening of eligibility documents is on <b><u>August 11, 2016</u></b> at <b><u>10:30 a.m.</u></b></li> </ul>
9.1	Contracts similar or related in nature shall refer to research and development consultancy contracts.
9.2	<p>The minimum qualifications of the consultancy firm are the following:</p> <ol style="list-style-type: none"> <li>a. Must be a reputable firm with adequate experience in the methodologies of research and development with at least ten (10) years of consultancy business operation;</li> <li>b. Must have completed at least five (5) studies/projects in the conduct of satisfaction evaluation and five (5) other studies/projects related in nature with the subject project;</li> <li>c. The evaluation team must be aware of the functions of the Governance Commission for GOCCs (GCG) and should have proven expertise on the demands of Performance Governance System (PGS) and ISO 9001 standards with regards to measurement and analysis of stakeholder satisfaction.</li> </ol> <p>The criteria and rating system for short listing are as follows:</p> <ol style="list-style-type: none"> <li>1. Firm’s work experience on Stakeholder Satisfaction Survey and related studies within the last 10 years (2005-2015) with a total of at least 10 projects (5 similar and 5 related) completed, with amounts of not less than Php 400,000 for each project - 35%</li> <li>2. Technical and managerial capacity to do additional work other than those currently being undertaken - 25%</li> <li>3. Firm’s work experience on specific activities of the project at hand – 40%</li> </ol> <p>The Consultant(s) must pass the required minimum score of seventy percent (70%) to be shortlisted. Maximum of five (5) prospective bidders shall be shortlisted.</p>

**STATEMENT OF ONGOING AND COMPLETED  
GOVERNMENT AND PRIVATE CONTRACTS**

Date: \_\_\_\_\_

**LILIA L. ARCE**

Chairman

**NDC Bids and Awards Committee**

**National Development Company**

NDC Building, 116 Tordesillas St.

Salcedo Village, Makati City

Dear **Mrs. Arce**:

In compliance with the requirements of the National Development Company (NDC) Bids and Awards Committee for the 2<sup>nd</sup> bidding of the Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor, we certify that (*insert company name*) has ongoing and completed projects within the past ten (10) years, summary of which is attached herewith.

Attached to this statement, is the summary of all the projects undertaken by our firm within the past ten (10) years (please refer to Annex B), and copies of supporting documents as proof that the project has been undertaken by/awarded to our firm. For completed projects, the Certified True Copy of Certificate of Satisfactory Completion are herein attached.

This is being issued in compliance with the eligibility requirements for the above Consulting Services.

Sincerely,

\_\_\_\_\_  
Printed name and signature of  
authorized representative





**B. OTHER STUDIES/PROJECTS RELATED TO RESEARCH AND DEVELOPMENT**

Project Name / Name of the contract	Name of Client	Location of the Contract /Client Location	Date of Award of the Contract	Start Date (Month/ Year)	Completion Date (Month/ Year)	Type & Brief Description of Actual Consulting Services	Consultant's Role (whether main consultant, subcontractor , or partner in JV)	Amount of Contract (in Php)	Contract Duration	Document presented to validate completion or award to the proponent

Notes:  
 1. Provide extra rows / extra sheet if needed  
 2. Attach Certified True Copy of Certificate of Satisfactory Completion for at least two (2) completed projects/studies related to research and development.

**STATEMENT OF CONSULTANT CONFIRMING THAT THOSE WHO WILL  
ACTUALLY PERFORM THE SERVICES MEET THE MINIMUM QUALIFICATION  
REQUIREMENTS**

Date: \_\_\_\_\_

**LILIA L. ARCE**

Chairman

**Bids and Awards Committee**

**National Development Company**

NDC Building, 116 Tordesillas St.

Salcedo Village, Makati City

Dear **Mrs. Arce**:

This is to certify that the following personnel who will perform the service meet the minimum qualification requirements in accordance with Clause 1.2.

<b>Name of Personnel</b>	<b>Assignment</b>
1.	Lead Evaluator & Interviewer
2.	Statistician & Data processor
3.	Enumerator/Interviewer
4.	Enumerator/Interviewer

Attach for your reference are the Curriculum Vitae of the above-mentioned personnel.

[*Insert name of bidder*] issues this statement in accordance with Clause 2.1.a.v of the eligibility requirements for the project.

Sincerely,

\_\_\_\_\_  
Printed name and signature of  
authorized representative

**LIST OF KEY IN-HOUSE OFFICERS AND PERSONNEL**

**A. KEY OFFICERS**

<b>Name</b>	<b>Position</b>
1.	
2.	
3.	
4.	
5.	

**B. KEY PERSONNEL**

<b>Name</b>	<b>Position</b>
1.	
2.	
3.	
4.	
5.	

Note: The key officers and personnel to be indicated in the list are the officers and employees being maintained by the consultancy firm.

\_\_\_\_\_  
Printed name and signature of  
authorized representative

\_\_\_\_\_  
Date

**Format of Curriculum Vitae (CV) for the Proposed Professional Staff**

Proposed Position: **e.g. Lead Evaluator & Interviewer**

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

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

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

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

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

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

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

**Education:**

*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained using the matrix below]*

School	Date attended	Degree Obtained

*(Provide extra rows if needed)*

**Trainings/Seminar:**

*[Summarize the trainings, seminars and symposiums attended, facilitated or conducted, giving course title, dates attended using the matrix below].*

Training	Date attended

*(Provide extra rows if needed)*

**\*Similar Position Held on Completed Projects:**

Similar Position Held	Project	Date undertaken	Location	No. of Years
<b>Total</b>				

*(Provide extra rows if needed)*

**\*Similar Position Held on Present Projects:**

Similar Position Held	Project	Date undertaken	Location	No. of Years
<b>Total</b>				

*(Provide extra rows if needed)*

***\*Similar Position as required in Eligibility Data Sheet - 2.1.a.iv.***

**Languages:**

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

Language	Proficiency

*(Provide extra rows if needed)*

**Professional Regulation Commission (PRC) License, as applicable:**

PRC License	License Number / Validity date

*(Provide extra rows if needed)*

**Certification:**

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience. Further, the undersigned commits to work for the Project once the contract is awarded to the firm which I work for.

\_\_\_\_\_ Date: \_\_\_\_\_  
*[Signature of staff member]*

**ELIGIBILITY DOCUMENTS SUBMISSION FORM**

**PROCUREMENT OF CONSULTING SERVICES FOR THE PREPARATION AND IMPLEMENTATION OF A STAKEHOLDER SATISFACTION EVALUATION OF NDC'S OVERALL PERFORMANCE AS AN INVESTMENT PARTNER, CLIENT AND LESSOR (2<sup>ND</sup> BIDDING)**

Date: \_\_\_\_\_

**LILIA L. ARCE**

Chairman

**NDC Bids and Awards Committee**

**National Development Company**

NDC Building, 116 Tordesillas St.

Salcedo Village, Makati City

Dear **Mrs. Arce**:

In connection with your Request for Expression of Interest dated \_\_\_\_\_ for the Procurement of Consulting Services for the Preparation and Implementation of a Stakeholder Satisfaction Evaluation of NDC's Overall Performance as an Investment Partner, Client and Lessor, *[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 therefore.

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, or LGUs, including foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, and that each of the documents submit; 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.

Sincerely,

\_\_\_\_\_  
Printed name and signature of  
authorized representative

**CHECKLIST OF ELIGIBILITY DOCUMENTS**

**PROCUREMENT OF CONSULTING SERVICES FOR THE PREPARATION  
AND IMPLEMENTATION OF A STAKEHOLDER SATISFACTION  
EVALUATION OF NDC’S OVERALL PERFORMANCE AS AN INVESTMENT  
PARTNER, CLIENT AND LESSOR**

<b>TAB</b>	<b>Date and time of submission:</b>	
	<b>Original Copy</b>	
	<b>Copy 1</b>	
	<b>Copy 2</b>	
<b>A</b>	<b>Eligibility Documents Submission Form</b>	
	<b>Class “A” Documents</b>	
<b>B</b>	<b>Legal Documents</b>	
	a.i	Registration certificate from Securities and Exchange Commission (SEC) for corporation, Department of Trade and Industry (DTI) for sole proprietorship, or Cooperative Development Authority (CDA) for cooperatives
	a.ii	Valid Mayor’s permit issued by the city or municipality where the principal place of business of the prospective bidder is located;
	a.iii	Valid Tax clearance per Executive Order 398. Series of 2005, as finally reviewed and approved by the BIR.
<b>C</b>	<b>Technical Documents</b>	
	a.iv	<p>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 <b>EDS</b>.</p> <p>To be attached to the statement is the summary of all the contracts within ten (10) years (please refer to Annex B), and copies of supporting documents as proof that the project has been undertaken by/awarded to the proponent. For completed projects, attach Certified True Copy of Certificate of Satisfactory Completion.</p>
	a.v	<p>Statement of the consultant confirming that those who will actually perform the service meet the minimum qualification requirements in accordance with Clause 1.2.</p> <p>To be attached to the Statement are the CVs of the following key personnel who shall be assigned to work on the project:</p> <ol style="list-style-type: none"> <li>1. Lead Evaluator &amp; Interviewer</li> <li>2. Statistician &amp; Data Processor</li> <li>3. Enumerator/Interviewer (2)</li> </ol>



<b>Financial Documents</b>		
	a.vi.	<p>The consultant's <b>2015</b> Audited Financial Statements, showing, (a) the consultant's total and current assets and liabilities, (b) stamped "received" by the BIR or its duly accredited and authorized institutions.</p> <p>The 2015 Annual Income Tax Return filed through its Electronic Filing and Payment System (EFPS)</p>
<b>E</b>	<b>Class "B" Documents</b>	<p>Valid joint venture agreement (JVA) duly notarized, in case a joint venture is already in existence. In the absence of a JVA, 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, shall be included in the bid. Failure to enter into a joint venture in the event of a contract award shall be ground for the forfeiture of the bid security.</p> <p>Each partner of the joint venture shall submit the Legal and Technical Eligibility documents. The submission of Financial Document by any of the joint venture partners constitutes compliance.</p>

**Reminder:**

This checklist serves only as a guide to the bidders. It is still the responsibility of each bidder to make sure it complies with the requirements.