

**REQUEST FOR PROPOSAL/QUOTATION**

Engagement of a Consulting/Survey Firm for the FY 2021 PCC Client Satisfaction Survey (CSS)

P.R. No./Date Received: **2021-07-0094/ 04 August 2021**

RFQ/P No. / Date: **2021-07-0102/ 23 August 2021**

The Philippine Competition Commission invites all eligible suppliers, contractors and consultants to quote the best offer for the described item in the attached **Terms of Reference** subject to the Terms and Conditions and within the **Approved Budget for the Contract (ABC)**.

**Required Documents/Information to be submitted as Attachments to the Quotation/Proposal:**

- **Mayor's/Business Permit**
- **PhilGEPS Registration Number**
- **Latest Income/Business Tax Return**
- **Notarized Omnibus Sworn Statement**
- **Signed Terms of Reference**
- **Forms required under Annex A of the Terms of Reference**

This pro-forma quotation maybe submitted through **registered** or **electronic mail** to the PCC Bids and Awards Committee (PBAC) Secretariat at above address or email to **npptallano@phcc.gov.ph** or **procurement@phcc.gov.ph** on or before **27 August 2021, 12:00 NN** subject to the following **Terms and Conditions**:

1. All entries shall be typed or written in a clear legible manner.
2. No alternate quotation/offer is allowed, suppliers who submitted more than one quotation shall be automatically disqualified.
3. All prices offered herein are valid, binding and effective for THIRTY (30) calendar days upon issuance of this document. Alternative bids shall be rejected.
4. Price quotations to be denominated in Philippine Peso shall include all applicable government taxes subject to **(BIR 2306)** 5% R-VAT and **(BIR 2307)** 1% (PO) or 2% (JO) deductions.
5. PCC PBAC Technical Working Group may require you to submit documents that will prove your legal, financial and technical capability to undertake this contract.
6. Salient provisions of the IRR of RA 9184: Section 68 - Liquidated Damages and Section 69 - Imposition of Administrative Penalties shall be observed.
7. PCC reserves the right to reject any and all quotations, declare a failure, or not award the contract pursuant to Sec 41 of the same IRR.
8. In case of tie quotations, suppliers' presence are required during tie breaking through draw lots or toss coin.
9. In case supplier pro forma quotation is submitted, conditions will be governed by the submitted signed **Terms of Reference/Technical Specifications**.

Very truly yours,

**JESON Q. DE LA TORRE**  
PBAC Chairperson

Item	QTY	ABC	Technical Specifications	Total Amount	
				(To be filled-up by the supplier)	
1	1	₱ 600,000.00	Engagement of a Consulting/Survey Firm for the FY 2021		
			PCC Client Satisfaction Survey (CSS)		
			Requirements indicated in the attached Terms of Reference		
Total Lot ABC		₱ 600,000.00	<b>TOTAL Amount</b>		
Instructions:			See attached Terms of Reference		

(Please provide **complete** information below)

We undertake, if our Proposal is accepted, to supply/deliver the goods in accordance with the specifications and/or delivery schedule.

We agree to abide by this proposal for the price validity period specified in the terms and conditions and it shall remain binding upon us and may be accepted at any time before the expiration of that period.

Until a Purchase/Job Order or a Contract is prepared and executed, this Quotation/Proposal shall be binding upon us. We understand that you are not bound to accept the lowest or any Proposal you may receive.

Signature over Printed Name : \_\_\_\_\_

Designation/Position : \_\_\_\_\_

Name of Company : \_\_\_\_\_

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

Telephone / Fax : \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Company Tax Identification Number : \_\_\_\_\_



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**TERMS OF REFERENCE:  
ENGAGEMENT OF A CONSULTING/SURVEY FIRM FOR THE  
FY 2021 PCC CLIENT SATISFACTION SURVEY**

**I. BACKGROUND AND RATIONALE**

The Philippine Competition Commission (PCC) is a quasi-judicial body mandated to implement the national competition policy and enforce Republic Act No. 10667 or the Philippine Competition Act, which serves as the country's primary competition law to maintain and promote market competition by regulating anti-competitive conduct.

Since its formal organization in 2016, the PCC has implemented organization-wide programs supporting the government's citizen-centered, clean, and efficient governance. Its ongoing initiatives include the implementation of a Quality Management System that aims to promote quality and stakeholder-oriented culture within the organization.

With the government's initiative to effectively streamline and improve the processes across all agencies through the enactment of Republic Act No. 11032 or the Ease of Doing Business and Efficient Government Service Delivery Act of 2018, the measurement and reporting of the satisfaction level of the clients has been required by the Anti-Red Tape Authority (ARTA). Consequently, this has been identified as one of the requirements to be eligible for the grant of the annual performance-based bonus (PBB). As such, agencies should ensure that appropriate feedback mechanisms and client satisfaction measurements are put in place alongside other process improvement efforts.

To comply with these requirements, the PCC has developed appropriate feedback mechanisms and client satisfaction measurement tools covering the external services<sup>1</sup> outlined in its Citizen's Charter. These tools need to be implemented and regularly appraised to ensure that they remain responsive to the requirements of oversight agencies and the Commission's needs.

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<sup>1</sup> Review of Mergers and Acquisitions Transactions; Provision of Pre-Notification Consultation; Evaluation of Letters of Non-Coverage; Receipt and Processing of Enforcement Complaints; Issuance of Binding Ruling; Receipt and Processing of Enforcement Related Questions and Queries; Provision of Orientation-Seminar on the PCA and PCC under the Competition Orientation Outreach Program; and Issuance of Certificate of Employment (COE) and Service Record (SR)



## II. OBJECTIVE

The primary objective of this project is to contract the services of a reputable survey firm that will:

- Prepare an updated Client Satisfaction Survey Design for PCC's External Services in accordance with the applicable guidelines and existing survey design; and
- Administer PCC's FY 2021 External Client Satisfaction Survey and process and report its results to the PCC.

## III. SCOPE OF WORK

### A. Tasks

The scope of work under this TOR covers two (2) major activities, namely: (1) Preparation of an Updated Client Satisfaction Survey Design for PCC's External Services; and (2) Conduct of the FY 2021 Client Satisfaction Survey for PCC's External Services.

The Service Provider is expected to:

### **Preparation of an Updated Client Satisfaction Survey Design for PCC's External Services**

1. Review and prepare an updated PCC Client Satisfaction Survey Design for External Services in accordance with existing statutory and regulatory requirements, such as those prescribed under AO 25 Inter-Agency Task Force Memorandum Circular No. 2021-1 which provides for the guidelines for the grant of the Performance-Based Bonus for FY 2021. Said review and updating shall cover the following aspects of the survey design:
  - a. Data Gathering Methodology;
  - b. Respondents Criteria;
  - c. Survey Sampling Coverage;
  - d. Sampling Procedure;
  - e. Survey Instruments, i.e., the Service Quality Dimensions<sup>2</sup> and Rating Scale<sup>3</sup>; and
  - f. Analysis and Reporting of Results.
2. Submit the updated Client Satisfaction Survey Design for PCC's External Services to the End-User for vetting.
3. Finalize the Client Satisfaction Survey Design for PCC's External Services based on the inputs of the End-User, if any.

### **Conduct of the FY 2021 Client Satisfaction Survey for PCC's External Services**

1. Coordinate with the End-User for the list of target respondents or external clients<sup>4</sup> to be subjected to client satisfaction survey.
2. Administer the FY 2021 External Client Satisfaction Survey.
3. Analyze the results of the FY 2021 External Client Satisfaction Survey.

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<sup>2</sup> The eight (8) SQDs are *Responsiveness, Reliability (Quality), Access & Facilities, Communication, Costs, Integrity, Assurance and Outcome*

<sup>3</sup> 5-point Likert Scale

<sup>4</sup> Clients who availed of the PCC's external services enrolled in the PCC Citizen's Charter

4. Prepare and submit a report detailing the quantitative and qualitative analysis of the FY 2021 External Client Satisfaction Survey results to the End-User.

## **B. Implementation Agreement**

### **The Service Provider shall:**

1. Organize a team that will conduct the approved activities, following the set of qualifications described in this TOR;
2. Designate one project lead to ensure the timely delivery of outputs and to coordinate with the End-User in carrying out the activities required for this project;
3. Seek the approval of the PCC, through the End-User, on any modification or adjustment in the implementation of approved activities prior to its conduct;
4. Administer the external surveys;
5. Submit all deliverables to the PCC, through the End-User, on schedule; and
6. Turnover all data/information/materials generated from the engagement to the End-User, which shall remain the sole and exclusive property of the PCC.

## **IV. SERVICES TO BE PROVIDED BY THE PCC**

### **The PCC, through the End-User, shall:**

1. Designate a counterpart team that will work with the Service Provider and provide general supervision and direction in the conduct of the approved activities;
2. Provide information/data and resource materials for the conduct and delivery of the approved activities, as necessary;
3. Review and approve the materials and other documents prepared by the Service Provider; and
4. Pay the project cost inclusive of mandatory taxes and in accordance with the set payment schedule.

## **V. APPROVED BUDGET FOR THE CONTRACT**

The Approved Budget for the Contract (ABC) for this engagement is **SIX HUNDRED THOUSAND PESOS (₱ 600,000.00)**, inclusive of all applicable government taxes, service charges and shall include all remunerations, costs or profits arising from or in relation to the services rendered in connection with and/or in preparation for this engagement. The services shall be a fixed price contract. Any extension of contract time shall not involve any additional cost to the PCC.

## **VI. MODE OF PROCUREMENT**

The mode of procurement shall be Negotiated Procurement – Small Value Procurement provided under the Revised IRR of Republic Act No. 9184.

## VII. EXPECTED DURATION OF THE CONTRACT

The project shall be completed within four (4) months, following the provisional timeline below. The project shall commence not later than five (5) working days upon the approval of the contract of both parties.

Activity	Expected Output	Month*			
		1	2	3	4
<b><i>Pre-Implementation</i></b>					
Levelling-off Meeting between the Service Provider and the End-User	Inception Report and Revised Project Work Plan				
<b><i>Preparation of an Updated PCC Client Satisfaction Survey Design for External Services</i></b>					
Review and/or updating of the existing Survey Design	Initial draft of the updated PCC Client Satisfaction Survey Design for External Services				
Vetting and Finalization	Final draft of the updated PCC Client Satisfaction Survey Design for External Services				
<b><i>Conduct of the FY 2021 PCC Client Satisfaction Survey for PCC's External Services</i></b>					
Administration of the FY 2021 External Client Satisfaction Survey including data processing and reporting	FY 2021 PCC Client Satisfaction Survey Report for External Services				

\* Reckoning date of Month 1 is upon signing of Job Order by the Service Provider.

## VIII. DELIVERABLES AND SCHEDULE OF PAYMENT

Payment shall be in accordance with the completion of the following activities as supported by the submission of the Service Provider and final acceptance by the PCC of the required deliverables, to wit:

Activity	Deadline*	Percentage of the Contract Price
Submission and final acceptance of the Inception Report and Revised Project Work Plan	10 calendar days from the Levelling-off Meeting	10%
Submission and final acceptance of the Final Draft of the updated PCC Client Satisfaction Survey Design for External Services	Within 30-40 calendar days from the acceptance of the Revised Project Work Plan	25%
Submission of the Preliminary FY 2021 PCC Client Satisfaction Survey Report for External Services	Within 70-80 calendar days from the acceptance of the Revised Project Work Plan	40%
Submission and final acceptance of the FY 2021 PCC Client Satisfaction Survey Report for External Services	Within 100-110 calendar days from the acceptance of the Revised Project Work Plan	25%
<b>Total</b>		<b>100%</b>

All payments shall be endorsed by the Director of the Finance, Planning and Management Office; and each tranche payment to the Service Provider shall be released upon PCC's receipt and acceptance of the outputs/deliverables listed above supported by the issuance of a Certificate of Satisfactory Services Rendered by the PCC. The outputs/activities for each tranche payment shall be in accordance with the requirements defined in this TOR to be accepted by PCC.

## IX. QUALIFICATIONS OF THE SERVICE PROVIDER

The PCC intends to engage an established Consulting/Survey Firm in the Philippines with the required personnel and experience to implement this project.

For eligibility purposes, the prospective offerors must be any of the entities outlined in Section 24.3.1 of the Revised IRR of R.A. No. 9184:

- 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; 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.

The prospective offerors must also submit the legal, technical and financial documents under Section 24 of the same Act and meet the following requirements:

Criteria	Qualifications	Preferred Requirements
<b>Applicable Experience of the firm</b>	An entity in the Philippines with experience in management consulting or survey research and management, i.e., survey design and development, client relations management, statistical analysis and reporting, operations and performance management, and other similar and/or relevant fields.	<ul style="list-style-type: none"> <li>▪ Must have been in existence for at least five (5) years;</li> <li>▪ Handled at least five (5) projects in the past five (5) years on the following: survey design and development, client satisfaction researches and surveys, statistical data processing and reporting, client relations management or other similar and/or related fields. <b>These projects should have been accepted and rated at least Satisfactory by the clients.</b></li> <li>▪ Provided services to a multinational client in the past five (5) years.</li> </ul>

<p><b>Quality of team lead and members to be assigned to this project</b></p>	<p><b>Experience:</b> in the field of survey research and management, client relations management and other similar and/or relevant fields.</p> <p><b>Education:</b> in the field of statistics, industrial engineering, hospitality management, public/business administration, and other similar and/or relevant fields.</p> <p><b>Training:</b> in survey design and development, statistical data processing and reporting, statistical tools and software, client relations management, and other similar and/or relevant trainings.</p>	<p><b>Team Lead:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Experience:</b> With at least five (5) years experience in leading projects in the indicated fields.</li> <li>▪ <b>Education:</b> Preferably with Master’s degree in the indicated disciplines.</li> <li>▪ <b>Training:</b> Preferably with 24 hours of training in the indicated topics.</li> </ul> <p><b>Team Member/s:</b></p> <ul style="list-style-type: none"> <li>▪ <b>Experience:</b> With at least three (3) years experience in implementing projects in the indicated fields.</li> <li>▪ <b>Education:</b> Preferably with Bachelor’s degree in the indicated disciplines.</li> <li>▪ <b>Training:</b> Preferably with 24 hours of training in the indicated topics.</li> </ul>
<p><b>Overall Work Commitment</b></p>	<p><b><u>Current workload relative to capacity</u></b></p> <p>Refers to the absorptive capacity of the project team members to do additional works other than those that they are currently undertaking.</p>	<ul style="list-style-type: none"> <li>▪ Preferably handling three (3) on-going contracts/projects only, including awarded but not yet started contracts/projects</li> </ul>

## X. CRITERIA FOR EVALUATION OR SELECTION

The PCC shall select the most qualified service provider using the Quality-Cost Based Evaluation (QCBE) pursuant to the pertinent provisions of R.A. No. 9184. The 70% - 30% quality to cost ratio shall be used for this purpose allocated as follows:

Evaluation Criteria	Weight
<p><b>Technical Proposal</b></p> <ul style="list-style-type: none"> <li>▪ <i>Applicable Experience (15%)</i></li> <li>▪ <i>Quality of Personnel (30%)</i></li> <li>▪ <i>Overall Work Commitment (15%)</i></li> <li>▪ <i>Plan of Approach and Methodology (40%)</i></li> </ul>	70%
<p><b>Financial Proposal</b></p>	30%
<b>Total</b>	<b>100%</b>

The bidder with the highest rated score based on the technical and financial proposals submitted, provided that the score shall pass the hurdle score of **80 points**, shall be the Highest Rated Bidder.

To ensure that the requirement under this Terms of Reference are met, prospective offerors are requested to submit the documentary requirements listed in **Annex A**.



## **XI. RESERVED RIGHTS ON THE USE OF THE OUTPUTS/DELIVERABLES**

All concepts and original materials formulated and designed in conjunction with this project shall be owned by the PCC with full and exclusive rights on future use thereof both in the Philippines and internationally.

## **XII. INFORMATION SECURITY AND NON-DISCLOSURE AGREEMENT**

To ensure protection of PCC information assets, bidders are expected to observe and abide by the established PCC Information Security Management System (ISMS) and shall agree to sign a non-disclosure agreement.

All data, documents, records, configuration files and metadata (collectively "Information") to be provided to the bidders for purposes of delivering the Services are considered confidential information and shall remain the sole property of PCC. The Service Provider shall acknowledge the importance of maintaining security and confidentiality of the Information and agree to prevent unauthorized transfer, disclosure, or use of these Information by any third person or entity. Bidders shall not use the Information for any purpose other than in connection with the Services. Bidders shall ensure that it will not retain, after completion of the Services with which the Information was provided, all or any portion of the Information, in any manner whatsoever. The Service Provider shall be required to sign Confidentiality/Non-Disclosure Agreement upon Notice of Award (NOA).

## **XIII. LIQUIDATED DAMAGES**

If the Service Provider fails to deliver any or all of the goods and/or to perform the services within the period specified in this contract, the Procuring Entity shall, without prejudice to its other remedies under this contract and under the applicable law, deduct from the contract price as liquidated damages, the applicable rate of one-tenth (1/10) of one percent (1%) of the cost of unperformed portion of every day of delay. The maximum deduction shall be ten percent (10%) of the amount of the contract. Once the maximum is reached, the procuring entity reserves the right to rescind the contract, without prejudice to other courses of action and remedies open to it.

## **XIV. DISPUTE RESOLUTION**

Should any dispute related to the TOR and/or rights of the parties arise, the same shall be submitted to mutual consultation, mediation, and arbitration, in the order of application. The venue of the proceedings shall be in Quezon City.

In case of a court suit, the venue shall be the courts of competent jurisdiction in Quezon City, to the exclusion of all other courts; and

Any amendment or additional terms and conditions to the TOR must be in writing, signed and acknowledged by the Parties.



Prepared by:



**ROXANNE MARIE B. TABOR**  
Administrative Officer III  
FPMO-Corporate Planning and Management Division

Approved by:



**ATTY. JOSEPH MELVIN B. BASAS**  
Director IV  
Finance, Planning and Management Office

Reviewed by:



**JOSEPH D. BERNAT**  
Planning Officer V  
FPMO-Corporate Planning and Management Division

<b>CONFORME:</b>
<hr style="border: 0; border-top: 1px solid black; margin: 10px 0;"/> Name of Service Provider
<hr style="border: 0; border-top: 1px solid black; margin: 10px 0;"/> Signature of Authorized Representative
<hr style="border: 0; border-top: 1px solid black; margin: 10px 0;"/> Designation
<hr style="border: 0; border-top: 1px solid black; margin: 10px 0;"/> Date

## Engagement of Consulting/Survey Firm for the FY 2021 PCC Client Satisfaction Survey

<b>Procuring Entity</b>	Philippine Competition Commission
<b>Address</b>	25/F Vertis North Corporate Center 1, North Avenue, Quezon City 1105
<b>Project Name</b>	Engagement of Consulting/Survey Firm for the FY 2021 PCC Client Satisfaction Survey
<b>FY 2021 Client Satisfaction Survey Assumptions</b>	<i>For External Services (to be administered by the Service Provider, including processing and reporting)</i> No. of external services: 8 No. of respondents: Approximately 50-90 Priority method: Face-to-face interview Alternative method: Online survey supported with phone interview, as necessary
<b>Approved Budget for the Contract</b>	Six Hundred Thousand Pesos (₱ 600,000.00) inclusive of all applicable government taxes and service charges
<b>Whom to Address the Proposal</b>	<b>DIRECTOR JESON Q. DE LA TORRE</b> Chairperson, Bids and Awards Committee Philippine Competition Commission  <b>Thru: THE SECRETARIAT</b> Bids and Awards Committee Administrative Office – General Services Division
<b>Documents to be Submitted</b>	<p><b>Eligibility Documents</b>  <b>(to be submitted after review and evaluation of proposals)</b></p> <ul style="list-style-type: none"> <li>- PhilGEPS Registration Number</li> <li>- Mayor's/Business Permit in case of firm</li> <li>- BIR Certificate of Registration in case of individual</li> <li>- Latest Business Tax Return in case of firm</li> <li>- Latest Income Tax Return in case of individual</li> <li>- Accomplished Omnibus Sworn Statement (<i>Use Form A</i>)</li> </ul> <p><b>Technical Proposal</b></p> <ol style="list-style-type: none"> <li>a. Cover Letter</li> <li>b. Company Profile</li> <li>c. List of all completed government and private contracts, including contract/s awarded but not yet started, if any, which is/are similar to the project to be bid (<i>Use Forms B and C</i>)</li> <li>d. Certificate of satisfactory service from at least five (5) previous clients, two (2) of which from government clients;</li> <li>e. Duly accomplished Project Team Information Sheet that outlines the team's composition and work distribution (<i>Use Form D</i>)</li> <li>f. Curriculum Vitae of Project Team Lead and Members (<i>Use Form E</i>)</li> <li>g. Description of the Methodology and Work Plan for performing the project</li> </ol> <p><b>Financial Proposal</b>          Financial Proposal with cost breakdown</p>

**Annex B**  
*Detailed Rating Criteria for Bid Evaluation of Bidders*

CRITERIA	PARAMETERS	RATING SYSTEM		SCORE	FACTOR VALUE	
Applicable Experience (15%)	Number of years in operations/existence; (40%)	100	More than six (6) years			
		90	Six (6) years			
		80	Five (5) years			
		70	Four (4) years			
		60	Three (3) years			
		50	Two (2) years			
		40	One (1) year			
		30	Less than one (1) year			
	Number of projects handled in the past five (5) years on the following: survey design and development, client satisfaction researches and surveys, statistical data processing and reporting, client relations management or other similar and/or related fields. These projects should have been accepted and rated at least Satisfactory by the clients; or at least currently ongoing. (50%)	100	Seven (7) or more projects accepted and rated at least Satisfactory by the clients			
		90	Six (6) projects accepted and rated at least Satisfactory by the clients			
		80	Five (5) projects accepted and rated at least Satisfactory by the clients			
		70	Four (4) projects accepted and rated at least Satisfactory by the clients			
		60	Three (3) projects accepted and rated at least Satisfactory by the clients			
		50	Two (2) projects accepted and rated at least Satisfactory by the clients			
		40	One (1) project accepted and rated at least Satisfactory by the clients			
		0	No projects accepted and rated at least Satisfactory by the clients.			
	Number of multinational clients handled in the past five (5) years (10%)	100	Provided services to three (3) or more multinational clients in the past five (5) years			
		90	Provided services to two (2) multinational clients in the past five (5) years			
		80	Provided services to one (1) multinational client in the past five (5) years			
		0	No multinational clients			
	Quality of Personnel (30%)	Team Leader (60%)				
		Relevant experience/ Number of years of experience as Team Leader of projects pertaining to the field of survey research and management, client relations management and other similar and/or relevant fields. (50%)	100			Seven (7) years or more
			90			Six (6) years
			80			Five (5) years
			70			Four (4) years
			60			Three (3) years
			50			Two (2) years
			40			One (1) year
0			Less than one (1) year			
Educational Attainment in the field of statistics, industrial engineering, hospitality management, public/business administration, and other similar and/or relevant fields. (40%)		100	With PhD in the indicated discipline/s			
		90	With PhD in any discipline			
		80	Master's degree in the indicated discipline/s			
		70	With Bachelor's degree in the indicated discipline/s or Master's degree in any discipline			

		60	BS/BA degree holder in any field or lower		
	Relevant Training in survey design and development, statistical data processing and reporting, statistical tools and software, client relations management, and other similar and/or relevant trainings. (10%)	100	With 40 hours or more of advanced or intermediate training		
		90	With 32 hours of advanced or intermediate training		
		80	With 24 hours of advanced or intermediate training		
		70	With less than 24 hours of advanced or intermediate training		
		60	With basic training (any number of hours)		
	Team Members (40%)				
	Relevant Experience/ Number of years of experience in implementing projects pertaining to the field of survey research and management, client relations management and other similar and/or relevant fields. (50%)	100	Five (5) years or more		
		90	Four (4) years		
		80	Three (3) years		
		70	Two (2) years		
		60	One (1) year		
		0	Less than One (1) year		
	Educational Attainment in the field of statistics, industrial engineering, hospitality management, public/business administration, and other similar and/or relevant fields. (40%)	100	With Master's Degree in the indicated field		
		90	With Master's Degree in any field/s		
		80	With Bachelor's Degree in the indicated field		
		70	With Bachelor's degree in the any field/s		
		60	BS/BA degree holder in any field or lower		
	Relevant Training in survey design and development, statistical data processing and reporting, statistical tools and software, client relations management, and other similar and/or relevant trainings. (10%)	100	With 40 hours or more of basic training or at least 24 hours of intermediate/advanced training		
		90	With 32 hours of basic training		
		80	With 24 hours of basic training		
		70	With 16 hours of basic training		
		60	With 8 hours of basic training		
Overall Work Commitment (15%)	Current workload relative to capacity (100%)	100	Zero (0) to One (1) on-going project		
		90	Two (2) on-going projects		
		80	Three (3) on-going projects		
		50	Four (4) on-going projects		
		20	Five (5) or more on-going projects		
Plan and Methodology (40%)	Workplan (30%)	100	<b>Outstanding</b>  Characteristics under "satisfactory" are present. Decision points and the sequence and timing of activities are very well defined, indicating that the offeror has optimized the use of resources. The work plan is explained in relation to the proposed approach		

			and permits flexibility to accommodate contingencies.		
		80	<b>Satisfactory</b>  The work plan fits the TOR well; all important activities are indicated in the activity schedule and their timing is appropriate and consistent with the assignment outputs; and the interrelation between the various activities is realistic and consistent with the proposed approach. There is a fair degree of detail that facilitates understanding of the proposed work plan.		
		20	<b>Unsatisfactory</b>  All key activities are included in the work plan, but they are not detailed. There are minor inconsistencies between timing, assignment outputs, and proposed approach.		
	Approach and Methodology (70%)	100	<b>Outstanding</b>  Characteristics under “satisfactory” are present with additional activities/ recommendations that add value to the project. Important issues are approached in an innovative and efficient way, indicating that the offeror has understood the main issues of the assignment and has outstanding knowledge of new solutions. The proposal details ways to improve the results and the quality of the assignment by using various approaches, methodologies, and knowledge.		
		80	<b>Satisfactory</b>  The proposed approach is discussed in full detail, and the methodology is specifically tailored to the characteristics of the assignment and flexible enough to allow its adaptation to changes that may occur during project execution.		
		20	<b>Unsatisfactory</b>  The steps to carry out the different activities of the TOR are discussed generically. The approach		

			is standard and not specifically tailored to the assignment. Although the approach and methodology are suitable, they don't include a discussion on how the offeror proposes to deal with critical characteristics of the assignment.		
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**Financial Proposal (30%)**

The score/s of the other bidders will be computed using the following formula: Financial Score = (LFP/FP) x 0.30  
Where LFP is the amount of the lowest financial proposal, and FP is the amount of the Financial Proposal of the bidder being rated.

<b>LFP</b>	<b>FP</b>	<b>(LFP/FP)</b>
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<i>Applicable Experience</i>	<i>X (0.15)</i>	
<i>Quality of Personnel</i>	<i>X (0.30)</i>	
<i>Overall Work Commitment</i>	<i>X (0.15)</i>	
<i>Plan of Approach and Methodology</i>	<i>X (0.40)</i>	
<b>TOTAL (Technical Proposal)</b>		
<b>Technical Proposal</b>	<b>X (0.70)</b>	
<b>Financial Proposal</b>	<b>X (0.30)</b>	
<b>TOTAL</b>		

*Passing Score: 80*

## Omnibus Sworn Statement

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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 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 Bidder]* with office address at *[address of Bidder]*;

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

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

*If a sole proprietorship:* As the owner and sole proprietor, or authorized representative of *[Name of Bidder]*, I have full power and authority to do, execute and perform any and all 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]*, as shown in the attached duly notarized *Special Power of Attorney*;

*If a partnership, corporation, cooperative, or joint venture:* I am granted full power and authority to do, execute and perform any and all 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]*, as shown in the attached *[state title of attached document showing proof of authorization (e.g., duly notarized Secretary's Certificate, Board/Partnership Resolution, or Special Power of Attorney, whichever is applicable;)]*;

3. *[Name of Bidder]* 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 Bidder]* 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 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;

7. *[Name of Bidder]* complies with existing labor laws and standards; and

8. *[Name of Bidder]* 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) Made an estimate of 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]* 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 in relation to any procurement project or activity.

IN WITNESS WHEREOF, I have hereunto set my hand this \_\_\_ day of \_\_\_, 20\_\_ at \_\_\_\_\_, Philippines.

\_\_\_\_\_  
Offeror's Representative/Authorized Signatory

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

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 \_\_\_\_\_

**Form B**

**Statement of Completed Contracts**

This is to certify that \_\_\_\_\_ has the following completed contracts from 2015 to present:

Name/Title of Contract	a. Client's Name b. Client's Address c. Client's Contact No.	Nature of Work/Brief Description of Project	a. Date Awarded (Month and Year) b. Date Started (Month and Year) c. Date Completed (Month and Year)	Amount of Awarded Contract
<b>GOVERNMENT</b>				
<b>PRIVATE</b>				

Submitted by:

*Name of Representative of Offeror*

*Position*

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

**Instructions:**

- a) Cut-off date: The day before the deadline of submission of offers/proposals.
- b) Contracts that are similar to the project being procured in terms of nature and amount shall be prioritized for inclusion in the list.

**Form C**

**Statement of Ongoing and Awarded But Not Yet Started Contracts**

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

Name/Title of Contract	a. Client's Name b. Client's Address c. Client's Contact No.	Nature of Work/Brief Description of Project	a. Date Awarded (Month and Year) b. Date Started (Month and Year) c. Date of Completion (Month and Year)	Percentage Completion		Amount of Uncompleted Portion of the Contract
				Planned	Actual	
<b>GOVERNMENT</b>						
<b>PRIVATE</b>						

Submitted by:

*Name of Representative of Offeror*

*Position*

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

**Instructions:**

a) State all ongoing contracts including those awarded but not yet started which may be similar or not similar to the project called for procurement.

b) Cut-off date: The day before the deadline of submission of offers/proposals.

**Form D**

**Project Team Information Sheet**

Name	Position in Project Team	Role or Tasking

Full Name and Signature of Offeror's Representative

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

**Form E**

**Format of Curriculum Vitae**

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Position in the Proposed Project Team: \_\_\_\_\_

Name of Firm/Entity: \_\_\_\_\_

Name: \_\_\_\_\_

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

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

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

Assigned Tasks/Role in the Proposed Project Team:

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**Key Qualifications**

*Outline experience and training relevant to the project/engagement. Include dates (in months and years) with detailed description/discussion on the nature and scope of work handled. Describe the degree of responsibility held on previous projects and give dates and locations.*

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**Education**

*Summarize college/university and other specialized education. Identify the names of schools, inclusive dates attended, and degrees obtained.*

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**Professional License/s and Eligibilities**

*State all applicable professional licenses/eligibilities, date and place of conferment, license number and validity), and name of appropriate body regulating the practice the stated profession and/or allied profession.*

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**Employment Record/Contracts/Projects**

*Starting with the present position, list all employment positions held after graduation. Give specific dates/duration, names of employers, titles of positions held, and project location/address. For work experience (in at least last seven years for team leader and in at least last five years for team members), also indicate role played and types of activities performed and client references, where appropriate. **Failure to indicate details of role and duration shall merit zero points.***

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**Trainings Attended**

*Summarize trainings/seminars attended as a participant. Indicate the topic and duration in terms of hours/days.*

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**Certification**

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

\_\_\_\_\_  
Full Name and Signature of Concerned Project Team Staff

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