



REPUBLIC OF THE PHILIPPINES
DEPARTMENT OF BUDGET AND MANAGEMENT
GENERAL SOLANO ST., SAN MIGUEL, MANILA

BIDDING DOCUMENTS

FOR THE

CONSULTING SERVICES FOR THE

PRODUCTION OF AUDIO-VISUAL

PRESENTATIONS (AVPs)

(PART I)

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REPUBLIC OF THE PHILIPPINES
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Section I. Request for Expression of Interest

CONSULTING SERVICES FOR THE PRODUCTION OF AUDIO-VISUAL PRESENTATIONS (AVPs)

1. The Department of Budget and Management (DBM), through the authorized appropriations under the FY 2015 General Appropriations Act, intends to apply the sum of **Five Hundred Thousand Pesos (₱500,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for Consulting Services for the Production of Audio-Visual Presentations (AVPs) consisting of the conceptualization, scriptwriting, storyboard formulation, animation production, and final editing and rendering of three (3) AVPs. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. In view of the failure of the first bidding, the DBM now invites bids for the second time for the submission of eligibility documents for Consulting Services for the Production of Audio-Visual Presentations (AVPs). Detailed service requirements are indicated in the Terms of Reference (TOR) for the project (see Annex A).
3. Interested consultants must submit their eligibility documents on or before **July 23, 2015, 1:00 p.m.** at the BAC Room, Ground Floor, DBM Bldg. III, General Solano St., San Miguel, Manila. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion. The consultant/s shall drop three (3) copies of their duly accomplished eligibility requirements in sealed envelopes in the bid box located at the above-mentioned address.
4. The BAC shall draw up the short list of consultants from those who have submitted eligibility documents and have been determined as eligible in accordance with the provisions of Republic Act (R.A.) No. 9184, otherwise known as the “Government Procurement Reform Act,” and its Implementing Rules and Regulations (IRR). The short list shall consist of five (5) interested consultants who will be entitled to submit bids. In accordance with Section 24 of R.A. No. 9184 and its IRR, the criteria and rating system for short listing are:
 - (i) Applicable experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firms or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants (30 points);

- (ii) Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking (60 points); and
 - (iii) Current workload relative to capacity (10 points).
5. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the IRR of R.A. No. 9184.
 6. The bids shall be evaluated using the Quality-Cost Based Evaluation/Selection (QCBE/QCBS) procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Consultants.
 7. The contract shall be completed until April 25, 2016, subject to the delivery dates set in the TOR.
 8. The DBM 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 consultant or consultants.
 9. For further information, please refer to:

DBM-BAC Secretariat
Department of Budget and Management
General Solano Street
San Miguel, Manila
Tel. no. 7912000 loc. 3121
Email address: rdiaz@dbm.gov.ph
vumali@dbm.gov.ph

ATTY. JANET B. ABUEL
Chairperson, DBM BAC

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CHECKLIST OF ELIBILITY REQUIREMENTS

I. Class “A” Documents –

Legal Documents

- 1. Registration certificate from:
 - Securities and Exchange Commission (SEC) - for partnerships/corporations; or
 - Department of Trade and Industry (DTI) - for sole proprietorship; or
 - Cooperative Development Authority (CDA) for cooperatives.

- 2. Mayor’s Permit issued by the city or municipality where the principal place of business of the interested consultant is located;

- 3. Tax Clearance per Executive Order No. 398, series of 2005, as finally reviewed and approved by the BIR.

Technical Documents

- 4. Eligibility Documents Submission Form accompanied by the company’s Secretary’s Certificate or Special Power of Attorney (Use Annex B)

- 5. Statement of all Government and Private Contracts Completed which are Similar in Nature (Use Annex C)

- 6. Certificate of Good Standing and Satisfactory Completion or equivalent document (for Completed Contracts)

- 7. List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started (Use Annex D)

- 8. Statement of the Consultant’s Nationality (Use Annex E)

- 9. Curriculum Vitae for the Proposed Professional Staff (Use Annex F)

Financial Document

- 10. Audited Financial Statements (AFS) for year 2014.

II. Class “B” Document –

Legal Documents

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

Section II. Eligibility Documents

1. Eligibility Criteria

- 1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:
 - (a) Duly licensed Filipino citizens/sole proprietorships;
 - (b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;
 - (c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;
 - (d) Cooperatives duly organized under 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 consultants 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 Government of the Philippines (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 interested consultants:

(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 interested consultant is located;
- (iii) Tax Clearance per Executive Order No. 398, series of 2005, as finally reviewed and approved by the BIR.

Technical Documents

- (iv) Statement of the interested consultant 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:
 - (iv.1) the name and location of the contract;
 - (iv.2) date of award of the contract;
 - (iv.3) type and brief description of consulting services;
 - (iv.4) consultant’s role (whether main consultant, subcontractor, or partner in a JV)
 - (iv.5) amount of contract;
 - (iv.6) contract duration; and
 - (iv.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, including their respective curriculum vitae.

Financial Document

(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" Document –

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. Interested consultants 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 an interested consultant 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. Interested consultants shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.

- 3.2. Interested consultants 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 interested consultant.
- 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 interested consultant.

4. Sealing and Marking of Eligibility Documents

- 4.1. Unless otherwise indicated in the **EDS**, interested consultants shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked “ORIGINAL – ELIGIBILITY DOCUMENTS”. Each copy of 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 interested consultant 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 interested consultant 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 Documents

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

6. Late Submission of Eligibility Documents

Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 5 shall be declared “Late” and shall not be accepted by the Procuring Entity.

7. Modification and Withdrawal of Eligibility Documents

7.1. The interested consultant 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 interested consultant 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 interested consultant unopened.

7.2. An interested consultant 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 interested consultant concerned. An interested consultant 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. An interested consultant 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 interested consultants’ representatives who choose to attend, at the time, on the date, and at the place specified in the **EDS**. The interested consultants’ 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 interested consultant. If the withdrawing interested consultant’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 interested consultant;
- (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 interested consultant shall be determined by examining each consultant'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 an interested consultant 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 an interested consultant 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 interested consultant concerned as "eligible." If an interested consultant 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 interested consultant 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 interested consultants 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 interested consultants 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 consultants shall be opened and considered for award of contract. These short listed consultants, 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 may be questioned in accordance with Section 55 of the revised IRR of R.A. No. 9184.

Section III. Eligibility Data Sheet

Eligibility Documents	
1.2	The Consulting Services shall provide conceptualization, scriptwriting, storyboard formulation, animation production, and final editing and rendering of three (3) animated audio-visual presentations (AVPs): one (1) AVP on the 2016 Budget, and two (2) AVPs on Budget Reforms.
1.3	No further instructions.
2.1.	Interested consultants shall submit the accomplished Eligibility Documents Submission Form (see Annex B for format), and a Secretary's Certificate or Special Power of Attorney, as may be applicable.
2.1.a (iv)	The List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started shall include all such contracts prior to July 16, 2015 (see Annex D for format). Likewise, the Statement of all Government and Private Contracts Completed which are Similar in Nature shall be submitted (see Annex C for format).
2.1.a (iv.7)	No further instructions.
2.1.b	In the absence of a JVA but submitted duly notarized statements from all the potential joint venture partners during Eligibility Document Submission, the submission of the valid JVA shall be within ten (10) calendar days from receipt by the consultant of the notice from the BAC that the consultant has the highest rated responsive bid. Failure to enter into a JVA in the event of a contract award shall be ground for the forfeiture of the bid security.
4.1	Each interested consultant shall submit one (1) original and two (2) copies of its eligibility documents.
4.3(c)	Department of Budget and Management Bids and Awards Committee DBM Building III, Ground Floor General Solano St., San Miguel, Manila
4.3(d)	Consulting Services for the Production of Audio-Visual Presentations (AVPs)
5	The deadline for submission of eligibility documents is July 23, 2015, 1:00 p.m. at the above-mentioned address.

8.1	<p>The place of opening of eligibility documents is:</p> <p>Department of Budget and Management Bids and Awards Committee DBM Bldg. III, Ground Floor General Solano St., San Miguel, Manila</p> <p>The date and time of opening of eligibility documents is July 23, 2015, 1:00 p.m.</p>
9.1	<p>To be considered in the short listing, the interested consultants should have completed a minimum of three (3) similar contracts.</p> <p>Similar contracts shall refer to the production of AVPs which are not less than three (3) minutes, and may be purely animated or have a combination of animation and live action footage. The AVPs should deal with the packaging of technical information and data into non-technical communication.</p> <p>At least one of the similar contracts should deal with a socio-economic or advocacy topic (not exclusively with government – may include those with non-government organizations [NGOs], private corporations [including corporate social responsibility units], academic institutions, etc.)</p> <p>Note: Interested consultants who will be short listed shall submit the actual AVPs for three (3) similar contracts, which include one dealing with a socio-economic or advocacy topic.</p>
9.2	<p>The BAC shall rank the eligible consultants in descending order based on their total scores considering the criteria prescribed below, and identify the top five (5) eligible consultants as short listed consultants. Should less than the required number apply for eligibility and short listing, pass the eligibility check, and/or pass the minimum score required in the short listing, the BAC shall consider the same.</p> <p>Scoring shall be based on the eligibility documents submitted considering the following evaluation criteria:</p> <ul style="list-style-type: none"> (i) Applicable experience of the firm or firms in a joint venture, measured as years of existence, awards and citations, and similar completed projects in the last two years. In case of joint ventures, the years of existence of only one member-firm (the one with the longest years of existence) will be considered; although the awards and citations, as well as similar completed projects, of all the firms in the joint venture will be considered (30 points);

	<p>(ii) Applicable experience and qualifications of personnel who will be assigned to the project vis-à-vis extent and complexity of the undertaking. This will be measured as the years of experience of all personnel be assigned, as well as the academic and other credentials (including awards) of the Executive Producer (60 points); and</p> <p>(iii) Current workload relative to capacity (10 points).</p> <p>Current workload relative to capacity refers to the number of ongoing projects of consultants (as indicated in the List of All Ongoing Government and Private Contracts including Contracts Awarded but not yet started: projects of the firm or firms in a joint venture, as well as those of the individual personnel to be assigned to the project) will be divided by the number of AVP production personnel currently employed by the firm or joint venture (including the personnel to be deployed). Consultants shall be ranked and rated accordingly.</p> <p>The minimum score required for each criterion is as follows:</p> <p>(i) Applicable experience of the firm or firms in a joint venture (12 points);</p> <p>(ii) Applicable experience and qualifications of personnel (24 points); and</p> <p>(iii) Current workload relative to capacity (4 points).</p>
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SECTION IV. BIDDING FORMS

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**Terms of Reference:
Consulting Services for the Production of
Audio-Visual Presentations (AVPs)**

I. OVERVIEW

1. The Department of Budget and Management (DBM) is implementing a reform agenda to empower citizens in the formulation and implementation of the annual National Budget, through greater transparency, accountability and citizen's engagement in the budget process. In line with this, it is implementing an Information, Education and Communication (IEC) campaign to better inform citizens about the annual National Budget as well as important reforms that seek to transform the budget process.
2. In implementing this IEC campaign, the DBM plans to procure **Consulting Services for the Production of Audio-Visual Presentations (AVPs)** on a) the 2016 National Budget, and b) the important budget reforms being implemented by the Department.
3. The **AVP Production Consultant** shall be a duly-registered firm—a proprietorship, partnership or corporation—or a joint venture of firms that shall provide the services needed for the production of the said AVPs: a) conceptualization; b) scriptwriting and storyboard formulation; c) animation production; and d) final editing and rendering.

II. SCOPE OF WORK AND DELIVERABLES

1. The AVP Production Consultant shall ensure the conceptualization, development and production of the said AVPs that should accurately and creatively portray the key concepts and basic information on the aforementioned subjects. In particular:
 - a. The AVP on the 2016 Budget should communicate the core theme or objective of the budget, the key principles, reforms, basic dimensions, and expenditure priorities, among other elements to be contained in an outline script that will be provided by the DBM.
 - b. Two (2) AVPs on Budget Reforms should communicate the basic concepts, facts and mechanics of one or a set of key budgeting reforms pursued under the Aquino Administration. Such reforms that may be tackled by the AVP **include but are not limited** to Performance-Informed Budgeting, GAA-as-Release Document, Bottom-Up Budgeting, and Unified Accounts Code, among others.

2. The AVPs to be produced should make use of motion graphics, animation, and other information graphics, with intermittent actual footage or photographs as may be required in the creative treatment to be taken by the AVP Producer. Prior to actual production, the AVP Producer will be required to present storyboards for approval by DBM. Each AVP should be around 5 – 10 minutes in length.
3. The AVP Production Consultant is encouraged to take branding, treatment and design cues (“look and feel”) from the People’s Budget publications, the DBM website and the Institutional Identity and Branding of DBM. The Consultant shall ensure that the technical information to be provided by DBM is clearly, concisely and creatively communicated, with the general audience as well as specific stakeholders (e.g. legislators, civil society, media, academe, etc.) in mind. The DBM may also provide the AVP Production Consultant with other resource materials, as needed.
4. The AVP Production Consultant’s storyboards and draft renders will all be submitted to the relevant DBM officials and staff for vetting and approval, as the case may be.

III. REQUIREMENTS AND CRITERIA FOR THE AVP PRODUCTION CONSULTANT

PART 1: ELIGIBILITY REQUIREMENTS

- a. **Eligibility Requirements:** per Section 24.1 of the IRR of the Government Procurement Reform Act (GPRA), and as indicated in the Request for Expression of interest and Eligibility Data Sheet (EDS)
 - **Accomplished Eligibility Documents Submission Form accompanied with the company’s Secretary’s Certificate or Special Power of Attorney.**
 - **Class "A" Documents**

Legal Documents:

 - Duly-registered firms - single proprietorship, partnership or corporation - or joint ventures of firms that are capable of rendering services needed for the production of the said AVPs shall be qualified to bid for the project. Such firms may be stand-alone AVP production firms or other such firms (e.g. design, advertising, public relations, boutique creatives, etc.) that have proven track record of at least one (1) year.
 - a. 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**;

- b. FY 2015 Mayor's permit issued by the city or municipality where the principal place of business of the interested consultant is located;
- c. Tax Clearance per Executive Order No. 398, series of 2005, as finally reviewed and approved by the BIR.

Technical Documents:

- List of all Ongoing Government and Private Contracts including Contracts awarded but not yet started.
- Statement of all Government and Private Contracts completed which are similar in nature - of not less than three (3) similar contracts completed within the last two years from June 25, 2015.
 - a. Similar contracts shall refer to the production of AVPs which are not less than three (3) minutes, and may be purely animated or have a combination of animation and live action footage. The AVPs should deal with the packaging of technical information and data into non-technical communication.
 - b. At least one of the similar contracts should deal with a socio-economic or advocacy topic (not exclusively with government – may include those with non-government organizations (NGOs), private corporations (including corporate social responsibility units), academic institutions, etc.)
 - c. The completed contracts to be indicated in the Statement shall be those undertaken by the firm or any of the firms in a joint venture; as well as individual contracts undertaken by the personnel indicated in the Proposed Organizational Chart. The completed contracts may include projects which are pro-bono or voluntary in nature.
- Statement of the consultant (firm) on the following:
 - a. the nationality of the firm; and,
 - b. that those who will actually perform the services are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

Financial Documents:

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.

- **Class “B” Document**

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.

- **Other Documents:**

Format of Curriculum Vitae (CV) for Proposed Professional Staff:

- **Firm's Profile** - Interested consultants shall also submit a Firm's Profile of the firm, which clearly indicates, among others, summary of services rendered by the firm, years of existence in the industry (at least one (1) year), relevant awards and citations received from reputable organizations of national scope in the last five (5) years, and list of names of AVP production personnel (excluding administrative staff) currently employed by the firm.
- **Proposed Organizational Chart for the Project** - indicating at least the following personnel assigned to the project:
- Executive Producer – He/She shall serve as the team leader and primary representative of the AVP Production Consultant for the duration of the project. He/she shall be responsible for the overall creative direction as well as the final outputs submitted to the DBM, and other tasks that he/she will be taking on (see item “c” below). He/she shall directly coordinate with the assigned representatives of DBM throughout the duration of the project. He/she must have at least five years of experience in AVP production. His/her academic and professional credentials will also be evaluated (see part IV below).

- Three (3) AVP Production Personnel – they shall fulfill any or all of the following functions for the project: scriptwriting, animation, design, editing, and other work needed for the production of the AVP. However, administrative functions (e.g. production assistants) shall not qualify. They must each have at least one year of experience in any or all of the aforementioned AVP production functions.
 - a. The functions of the personnel must be clearly indicated in the Proposed Organizational Chart. These minimum personnel required may perform multiple functions (e.g. the Executive Producer may also be the animator or scriptwriter). However, at least one (1) of these personnel should function as scriptwriter, and at least two (2) as animators/editors (i.e., in no instance shall there be four animators but no scriptwriter indicated in the organizational chart).

- **Curriculum Vitae (CVs)** of each personnel to be deployed to the project together with the proposed organizational chart. The CVs must clearly indicate relevant work experience (including years and current and previous employment), bachelor's or higher degrees attained, certifications gained and seminars attended, and awards received from reputable organizations of national scope.
 - a. *On work experience* – must have work experience related to the production of AVPs, e.g. producing, directing, scriptwriting, creative writing, advertising, design, communication and/or mass media, as relevant to the tasks of the respective personnel.
 - b. *On academic credentials* – must have bachelors' and/or higher degrees attained relevant to this project and/or the tasks of the respective personnel to be deployed. Such degrees include the following fields: communication and mass media, liberal arts (e.g. fine arts, creative writing), marketing, business administration/commerce, and social sciences, and other related courses.

- c. *On professional certifications and seminars* – state professional certifications and seminars achieved and/or attended relevant to this project, and/or the tasks of the respective personnel to be deployed. Such include certifications in AVP production, scriptwriting, creative writing, advertising, design, communication and/or mass media.
- d. *On awards and citations* – state awards and citations received in the last five (5) years from national or academic organizations and industry associations (e.g., Advertising Board of the Philippines and its member associations).

PART 2: TECHNICAL AND FINANCIAL PROPOSAL

- a. Interested consultants who will eventually be shortlisted will later on be required to submit a **Portfolio of AVPs** containing a selection of three (3) of these AVPs, including at least one dealing with a a) socio-economic or advocacy, which are listed in the consultant's Statement, for technical evaluation by DBM (see part IV below).
- b. For AVPs with a run time exceeding 12 minutes, the AVPs must first be edited to reduce the run time to 12 minutes. The portfolio must be submitted in electronic form (CD/DVD, USB flash drive).
- c. Shortlisted interested consultants shall submit a Plan of Approach and Methodology for the Project through a **Creative Proposal for the Project**, in the form of:
 - i) A concept note or creative brief for the proposed creative and communication direction of the project.

The concept note or creative brief, a document of three to five pages, shall i) describe (narrative form as well as visual cues or pegs) the creative and messaging direction being proposed by the consultant for this project.

Shortlisted consultants may include visual cues or pegs in the document (e.g., screen caps or images) or as attachments, electronic files, or hyperlinks, and should be able to specify the different kinds and types of visual and audio effects that will be implemented. **The shortlisted consultants are expected to present visual cues or pegs for the AVP on the 2016 Budget.**

- ii) A storyboard sketch for the AVP on the 2016 Budget (*note: this will be submitted only after the eligibility and shortlisting stage*)

The DBM will require the shortlisted consultants to submit a storyboard sketch that will deal with the presentation of 2016 Budget. The DBM will provide the relevant source materials upon shortlisting of qualified consultants. The storyboard sketch should provide the messaging and editorial direction of the 2016 Budget AVP, using the 2015 Budget for purposes of evaluation.

- d. **Financial Proposal for the Project**, which shall be ranked and rated (see part IV below). The financial proposal must not exceed the Approved Budget for the Contract (ABC) of this project (see part V).

IV. PROCESS OF ACCEPTING AND EVALUATING PROPOSALS

- 1. **Submission of Eligibility Requirements.** Upon the issuance by DBM-BAC of a Request for Expression of Interest, interested consultants must submit three (3) copies of the Eligibility Requirements, per Section 24 of the Revised IRR of the GPRA. In addition, interested consultants must submit the following:

- a. Company Profile, with supporting documents on awards and citations
- b. Proposed Organizational Chart and Curriculum Vitae of personnel to be deployed

These must be submitted **no later than July 23, 2015, 1:00 p.m.** The DBM-BAC will then evaluate the eligibility of the interested consultants using pass/fail criteria.

- 2. **Short Listing.** Of the eligible interested consultants, a maximum of five (5) will be short listed based on the following:

- (i) Applicable experience of the firm or firms in a joint venture, measured as years of existence, awards and citations, and similar completed projects in the last two years. In case of joint ventures, the years of existence of only one member-firm (the one with the longest years of existence) will be considered; although the awards and citations, as well as similar completed projects, of all the firms in the joint venture will be considered.
- (ii) Applicable experience and qualifications of personnel who will be assigned to the project vis-à-vis extent and complexity of the undertaking. This will be measured as the years of experience of all personnel be assigned, as well as the academic and other credentials (including awards) of the Executive Producer; and

(iii) Current workload relative to capacity – to measure this, the BAC will use a formula that gauges how interested consultants are able to absorb this AVP Consulting project.

The number of ongoing projects of the interested consultants (as indicated in the List of All Ongoing Government and Private Contracts including Contracts Awarded but not yet started: projects of the firm or firms in a joint venture, as well as those of the individual personnel to be assigned to the project) will be divided by the number of AVP production personnel currently employed by the firm or joint venture (including the personnel to be deployed). Interested consultants shall be ranked and rated accordingly.

The rating system for the short listing will be as follows:

Shortlisting Criteria		Maximum Points	Minimum Points
I. Applicable Experience		30	12
	1. Years of Experience (at least 1)		
	2. Number of similar completed projects (of the firm/forms in a JV, and personnel to be deployed) in the last two years (at least 3)		
	3. Awards and citations of the firm from reputable organizations in the last 5 years		
II. Qualification of Personnel		60	24
	1. Executive Producer (Project Lead)		
	Academic credentials		
	Years of experience		
	Seminars attended, certifications, awards		
	2. AVP Production Personnel #1		
	Years of experience		
	3. AVP Production Personnel #2		
	Years of experience		
	4. AVP Production Personnel #3		
	Years of experience		
III. Current Workload relative to Capacity		10	4
TOTAL		100	40

3. **Notice of Eligibility and Short Listing.** The short listed interested consultants will then be requested to submit their technical and financial proposals, consisting of:

- A. Envelope 1: Technical Proposal for the Project
 - a. Portfolio of Similar Projects Handled
 - b. Creative Proposal for the Project
 - Concept Note/Creative Brief
 - Storyboard Sketch for the AVP on the 2016 Budget

B. Envelope 2: Financial Proposal for the Project

Interested consultants must submit these envelopes in triplicate. Interested consultants are responsible for adequately sealing their envelopes (with signatures at the edges) for their security. Improperly sealed envelopes mean that the interested consultants indemnify the DBM from any infringement of their intellectual property and other commercial rights.

4. **Evaluation of Shortlisted Consultants.** Evaluation will be based on the following criteria:

i) Quality of Personnel to be assigned. The DBM-BAC shall then proceed with the evaluation and rating of the personnel to be assigned to the project:

A. Executive Producer (Project Lead)

- a. years of experience in a relevant industry or profession (at least 5);
- b. academic and other qualifications (bachelor's and/or higher academic degree, relevant certifications or seminars, awards from reputable organizations);

B. AVP Production Personnel – separate ratings for three (3) personnel, based on years of experience in a relevant industry or profession (at least 1);

ii) Experience and Capability of the CONSULTANT. The DBM-BAC shall then proceed with the evaluation and rating of the a) overall experience of the CONSULTANT (firm), and b) the records of previous engagement and quality of performance in similar and in other projects.

a. Experience of the CONSULTANT (Firm)

- i. At least 1 year experience in a relevant industry or profession;
- ii. academic and other qualifications (bachelor's and/or higher academic degree, relevant certifications or seminars, awards from reputable organizations);

b. Evaluation of Previous Engagement and Quality of Performance based on Portfolio of AVPs. The DBM-BAC shall view all AVPs and rate one (1) Socio-Economic Advocacy AVP according to:

- i. Duly accomplished **Client Satisfaction (CSAT) Survey of former client** on the Socio-Economic Advocacy AVP;
- ii. Technical Production Ability – to be evaluated based on the number of audio and visual effects contained in the Socio-Economic AVP;

Socio-economic Advocacy AVP which is the subject of the CSAT survey shall be used for the quality evaluation. The other two (2) submitted AVPs will be used as reference.

iii) Plan of Approach and Methodology. The DBM-BAC shall then proceed with the evaluation and rating of the Creative Proposals according to:

- a. Concept Note for the AVP on the 2016 Budget
 - i. Technical Production Ability – shortlisted consultants must specify the different kinds and types of visual and audio effects that will be implemented for the AVP.
- b. Storyboard Sketch for the AVP on the 2016 Budget, using the 2015 Budget for purposes of evaluation
 - i. Technical Production Ability – shortlisted consultants must specify the different kinds and types of visual and audio effects that will be implemented (in actual chronology and sequence)
 - ii. DBM-BAC Evaluation – based on substance, completeness, accuracy and completeness, and overall impact.

5. **Evaluation of Financial Proposals.** The DBM-BAC shall then open the third envelope on a separate date from the opening of the Envelope 1: Technical Proposal for the Project to evaluate their respective financial proposals and will be ranked accordingly. Financial proposals which exceed the Approved Budget for the Contract of this project shall automatically be disqualified.

6. **Rating and Ranking of Interested consultants.** Interested consultants shall be ranked in descending from the highest overall rated bid to the lowest. The rating system will be as follows.

Criteria for Evaluation	Maximum Points
Technical Proposal	85
Financial Proposal	15
Total	100

7. Further, the rating for the Technical Proposals will be based on the following criteria:

Criteria for Technical Proposal	Maximum Points	Minimum Points
Quality of Personnel to be assigned	15	7.5
Experience and Capability of the CONSULTANT	40	20
Plan of Approach and Methodology	45	22.5
Total	100	50

**Overall passing score = 70 points*

V. BUDGET, FUNDING SOURCE AND TERMS OF PAYMENT

1. The approved budget for this consulting contract is **P500,000.00**, inclusive of government taxes.
2. Payment shall be made after the final submission and acceptance of outputs, to be fleshed-out by the winning consultant and the DBM, but consistent with the following:

% of Contract Cost	Deliverable and Indicative Delivery Date **
10.0%	Mobilization Cost. Upon submission of the revised Overall Concept Note/Creative Brief within 7 days upon the effectivity of the Contract
30.0% *	Upon submission of the final render of the AVP on 1 st Budget Reform no later than the 30 th of November 2015
30.0% *	Upon submission of the final render of the AVP on the 2016 Budget no later than the February 26, 2016
30.0% *	Upon submission of the final render of the AVP on 2 nd Budget Reform no later than the 25 th of April 2016
100.0%	TOTAL

*Net of the proportionate mobilization cost

** Indicative delivery dates may be adjusted after receipt written request from DBM – Strategic Communication Unit

3. The cost of the consulting services shall be charged against available DBM funds under the FY 2015 General Appropriations Act.

ELIGIBILITY DOCUMENTS SUBMISSION FORM

[Date]

Department of Budget and Management

Bids and Awards Committee
Building III, Gen. Solano St.
San Miguel, Manila

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated [insert date] for **CONSULTING SERVICES FOR THE PRODUCTION OF AUDIO-VISUAL PRESENTATIONS (AVPs)**, [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 therefor.

In line with this submission, we certify that:

- a) [Name of Consultant] is not blacklisted or barred from bidding by the GOP or any of its agencies, offices, corporations, 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.

Yours sincerely,

Signature
Name and Title of Authorized Signatory
Name of Consultant
Address

***Statement of all Government and Private Contracts Completed
which are Similar in Nature***

Business Name: _____

Business Address: _____

Name of Client	Date of the Contract	Kinds of Consulting Services	Amount of Contract	Date of Delivery	End User's Acceptance or Official Receipt(s) Issued for the Contract	Length of the AVP (minutes and seconds)	Theme of the AVP
<u>Government</u>							
<u>Private</u>							

Submitted by : _____
(Printed Name and Signature)

Designation : _____

Date : _____

Instructions:

- a) Projects should be completed within the two years immediately preceding July 16, 2015.
- b) Completed contract:
 - (i) If there are more than twenty (20) similar completed contracts in a year, state at least 20 completed contracts for said year.
 - (ii) If there are 20 or less similar completed contracts in a year, state all completed contracts for said year.
 - (iii) If there is no similar completed contract in a year, state none or equivalent term. This shall not be a basis for disqualification.
- c) Similar contracts shall refer to the production of AVPs which are not less than 3 minutes, and may be purely animated or have a combination of animation and live action footage. The AVPs should deal with the packaging of technical information and data into non-technical communication.

**List of all Ongoing Government and Private Contracts Including
Contracts Awarded but not yet Started**

Business Name: _____

Business Address: _____

Name of Client	Date of the Contract	Kinds of Consulting Services	Value of Outstanding Contracts	Date of Delivery
<u>Government</u>				
<u>Private</u>				

Submitted by : _____

(Printed Name and Signature)

Designation : _____

Date : _____

Instructions:

- i. State all ongoing contracts including those awarded but not yet started (government and private contracts which may be similar or not similar to the project being bid) prior to July 16, 2015.
- ii. If there is no ongoing contract including awarded but not yet started as of the aforementioned period, state none or equivalent term.

STATEMENT OF THE CONSULTANT'S NATIONALITY

Department of Budget and Management

Bids and Awards Committee
Building III, Gen. Solano St.
San Miguel, Manila

Ladies/Gentlemen:

In compliance with the requirements of the Department of Budget and Management – Bids and Awards Committee (DBM BAC) for the bidding for the Project, *Consulting Services for the Production of Audio-Visual Presentations (AVPs)*, I/we hereby declare the following:

1. [Select one and delete the rest].

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

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

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

2. That the following are the proposed personnel:

Name of Proposed Personnel	Proposed Position	Nationality	Proof of Identification
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

3. That attached herewith are the Curriculum Vitae of the above-mentioned personnel (*Annex/es _____*); and

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

Very truly yours,

Signature: _____

Name and Title of Authorized Signatory: _____

Name of Consultant/Company: _____

Address: _____ Contact No/s. _____

(Note: Please attach the notarized authority of the consultant's representative for the public bidding for this project)

FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

FIRM'S PROFILE

Name of Firm		
Form of Organization	Year Established	
Business Address		
Principal Contact Person		
Telephone Number	Fax Number	Email
General Description and Technical Capabilities		

Field of Specialization and Type of Services					
Field	Service Provided			Experience (No. of Years)	
Company Officers and Key Personnel					
Name	Position	Education	Expertise	Years with Firm	Age
Current Number of Personnel					
Position	Number				
	Full time	Part time	Total		
Awards, Certifications, Relevant Distinctions					
Name	Given By		Date		

(Note: Add rows above as may be necessary)

Signature: _____

Name and Title of Authorized Signatory: _____

Name of Consultant/Company: _____

CURRICULUM VITAE (CV) FOR PROPOSED KEY PROFESSIONAL STAFF

Proposed Team:		<i>Please check:</i>			
<input type="checkbox"/>		<input type="checkbox"/>			
		Key Personnel		Staff	
Name of Position:					
Personal Information					
Name of Staff					
Address		Contact No.		Email Address	
Date of Birth		Citizenship		Civil Status	
Work Experience (start from the current employment)					
Company Name	Inclusive Dates		Total <i>(Years, Months)</i>	Position Title	Actual Duties and Responsibilities
	From	To			

Current Workload *(include workload or projects from other companies, if any)*

Company Name	Inclusive Dates		Total <i>(Years, Months)</i>	Position Title	Actual Duties and Responsibilities
	From	To			

Relevant Training *(start from the most recent)*

Course Title	Inclusive Dates		Location	No. of Hours	Conducted/Sponsored by
	From	To			

Education <i>(start from the most recent)</i>				
School	Inclusive Dates		Degree Course	Scholarships/Academic Honors Received
	From	To		

Certificates, Other Credentials	
Title	Date Received

Certification:

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

Signature over Printed Name

Date: _____

