



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

**BIDDING DOCUMENTS**  
**FOR THE**  
**CONSULTANCY SERVICES FOR THE**  
**DESIGN AND IMPLEMENTATION OF THE**  
**DBM CAREERSHIP PROGRAM ON PUBLIC**  
**FINANCIAL MANAGEMENT (PFM)**  
  
**(PART I)**

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

**SECTION I. REQUEST FOR EXPRESSION OF INTEREST**

**CONSULTANCY SERVICES FOR THE  
DESIGN AND IMPLEMENTATION OF THE DBM CAREERSHIP  
PROGRAM ON PUBLIC FINANCIAL MANAGEMENT (PFM)**

1. The Department of Budget and Management (DBM), through the authorized appropriation under the FY 2016 General Appropriations Act, intends to apply the sum of Fourteen Million Pesos (P14,000,000.00) being the Approved Budget for the Contract (ABC) to payments under the contract for the Project, "Consultancy Services for the Design and Implementation of the DBM Careership Program on Public Financial Management (PFM)." Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The DBM now calls for the submission of eligibility documents for Consulting Services for the Project. Detailed service requirements are indicated in the Terms of Reference (TOR) of the Project (see Annex F).
3. The DBM will hold a meeting on the eligibility documents with the interested consultants (i.e., Consulting Firm/Group) on October 18, 2016, 10:00 a.m., at the Bids and Awards Committee (BAC) Conference Room, Ground Floor, DBM Building III, General Solano St., San Miguel, Manila, which shall be open to all interested parties.
4. Interested consultants must submit their eligibility documents on or before November 3, 2016, 10:00 a.m., at the BAC Conference Room, Ground Floor, DBM Building III, General Solano St., San Miguel, Manila. Applications for eligibility will be evaluated based on a non-discretionary "pass/fail" criterion.
5. The BAC shall draw up the short list of consultants from those who have submitted Expressions of Interest 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 at most 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:

Evaluation Criteria	Percent Distribution	Minimum Score
Experience of the Consultant	45%	31.5%
Qualifications of Personnel Assigned to the Project	40%	28%
Current Workload Relative to Job Capacity	15%	10.5%

Experience and capability of the Consultant will be assessed on the basis of records of previous engagements in similar and in other projects, relationship with previous and current clients, and overall work commitments.

In the event that the Consultant is composed of corporations in a valid joint venture agreement or which are potential joint venture partners, each partner of the joint venture shall submit the legal eligibility documents. The experience and capability of the Consultant shall be assessed based on the said submissions.

Qualifications of Personnel Assigned to the Project cover suitability of staff to perform the duties for the Project, and general qualifications and competence, including education and training of the key staff.

Evaluation of the Current Workload Relative to Job Capacity will ensure the logistical and technical capabilities of the Consultant to take on the Project.

6. 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.

Bidding is restricted to Filipino citizens/sole proprietorships, partnerships, or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines.

7. The DBM shall evaluate bids using the Quality Based Evaluation (QBE) procedure. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.
8. The contract shall be completed within one (1) year from receipt of Notice to Proceed.
9. 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.
10. For further information, please refer to:

DBM-BAC Secretariat  
BAC Conference Room  
Department of Budget and Management  
Ground Floor, DBM Building III, General Solano St., San Miguel, Manila  
Tel. no. 791-2000 loc. 3115  
Email address: [vumali@dbm.gov.ph](mailto:vumali@dbm.gov.ph)

  
**ATTY. ANDREA CELENE M. MAGTALAS**  
*Vice Chairperson, DBM-BAC*

## SECTION II. ELIGIBILITY DOCUMENTS

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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;
  - 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 prospective consultant is located;
  
- 3. Tax Clearance per Executive Order No. 398, series of 2005, as finally reviewed and approved by the Bureau of Internal Revenue (BIR).

#### Technical Documents

- 4. Eligibility Documents Submission Form accompanied by the company's Secretary's Certificate or Special Power of Attorney (Use Annex A)
  
- 5. Statement of all Government and Private Contracts Completed which are Similar in Nature (Use Annex B)
  
- 6. Certificate of Good Standing and Satisfactory Completion or equivalent document (for Completed Contracts)
  
- 7. Statement of all Ongoing Government & Private Contracts Including Contracts Awarded but not yet Started (Use Annex C)
  
- 8. Statement of the Consultant's Nationality (Use Annex D)
  
- 9. Curriculum Vitae for the Proposed Professional Staff (Use Annex E)

#### Financial Document

- 10. Audited Financial Statements (AFS) for year 2015.

### II. Class "B" Document –

#### Legal Documents

- 11. Valid Joint Venture Agreement (JVA) if joint venture 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.

## ELIGIBILITY DOCUMENTS

### 1. Eligibility Criteria

- 1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:
  - (a) Duly licensed Filipino citizens/sole proprietorships;
  - (b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;
  - (c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;
  - (d) Cooperatives duly organized under the laws of the Philippines, and of which at least sixty percent (60%) interest belongs to citizens of the Philippines; or
  - (e) Persons/entities forming themselves into a joint venture, *i.e.*, a group of two (2) or more persons/entities that intend to be jointly and severally responsible or liable for a particular contract: Provided, however, That Filipino ownership or interest thereof shall be at least sixty percent (60%). For this purpose, Filipino ownership or interest shall be based on the contributions of each of the members of the joint venture as specified in their JVA.
- 1.2. When the types and fields of Consulting Services involve the practice of professions regulated by law, those who will actually perform the services shall be Filipino citizens and registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions specified in the **EDS**.
- 1.3. If the Request for Expression of Interest allows participation of foreign consultants, prospective foreign bidders may be eligible subject to the qualifications stated in the **EDS**.
- 1.4. Government corporate entities may be eligible to participate only if they can establish that they (a) are legally and financially autonomous, (b) operate under commercial law, and (c) are not dependent agencies of the GOP or the Procuring Entity.

## 2. Eligibility Requirements

2.1. The following eligibility requirements shall be submitted on or before the date of the eligibility check specified in the Request for Expression of Interest and Clause 5 for purposes of determining eligibility of 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 prospective bidder 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 prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:
  - (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. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subcontractors may only participate in the bid of one short listed consultant. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.
- 2.5. If a prospective bidder has previously secured a certification from the Procuring Entity to the effect that it has previously submitted the above-enumerated Class "A" Documents, the said certification may be submitted in lieu of the requirements enumerated in Clause 2.1 above.

### **3. Format and Signing of Eligibility Documents**

- 3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.
- 3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.
- 3.3. The eligibility documents, except for unamended printed literature, shall be signed, and each and every page thereof shall be initialed, by the duly authorized representative/s of the prospective bidder.
- 3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

### **4. Sealing and Marking of Eligibility Documents**

- 4.1. Unless otherwise indicated in the EDS, prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy 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 prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
  - (a) contain the name of the contract to be bid in capital letters;
  - (b) bear the name and address of the prospective bidder in capital letters;
  - (c) be addressed to the Procuring Entity's BAC specified in the EDS;
  - (d) bear the specific identification of this Project indicated in the EDS; and
  - (e) bear a warning "DO NOT OPEN BEFORE..." the date and time for the opening of eligibility documents, in accordance with Clause 5.
- 4.4. If the eligibility documents are not sealed and marked as required, the Procuring Entity will assume no responsibility for its misplacement or premature opening.

**5. Deadline for Submission of Eligibility 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 prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as "ELIGIBILITY MODIFICATION" and stamped "received" by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.

7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.

7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder may also express its intention not to participate in the bidding through a letter which should reach and be stamped by the BAC before the deadline for submission and receipt of eligibility documents. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project.

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

8.1. The Procuring Entity's BAC will open the envelopes containing the eligibility documents in the presence of the prospective bidders' representatives who choose to attend, at the time, on the date, and at the place specified in the EDS. The prospective bidders' representatives who are present shall sign a register evidencing their attendance.

8.2. Letters of withdrawal shall be read out and recorded during the opening of eligibility documents and the envelope containing the corresponding withdrawn eligibility documents shall be returned unopened to the

withdrawing prospective bidder. If the withdrawing prospective bidder's representative is present during the opening, the original eligibility documents and all copies thereof shall be returned to the representative during the opening of eligibility documents. If no representative is present, the eligibility documents shall be returned unopened by registered mail.

- 8.3. A prospective bidder determined as "ineligible" has seven (7) calendar days upon written notice or, if present at the time of the opening of eligibility documents, upon verbal notification, within which to file a request for reconsideration with the BAC: Provided, however, that the request for reconsideration shall not be granted if it is established that the finding of failure is due to the fault of the prospective bidder concerned: Provided, further, that the BAC shall decide on the request for reconsideration within seven (7) calendar days from receipt thereof. If a failed prospective bidder signifies his intent to file a request for reconsideration, in the case of a prospective bidder who is declared ineligible, the BAC shall hold the eligibility documents until such time that the request for reconsideration or protest has been resolved.
- 8.4. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:
- (a) the name of the prospective bidder;
  - (b) whether there is a modification or substitution; and
  - (c) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.
- 8.5. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered "failed" for the particular eligibility requirement concerned. If a prospective bidder is rated "passed" for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "eligible." If a prospective bidder is rated "failed" in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "ineligible." In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

**9. Short Listing of Consultants**

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.
- 9.2. The BAC of the Procuring Entity shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Letter of Invitation to Bid issued by the BAC of the Procuring Entity.
- 9.4. Only bids from short listed bidders shall be opened and considered for award of contract. These short listed bidders, whether single entities or JVs, should confirm in their bids that the information contained in the submitted eligibility documents remains correct as of the date of bid submission.

### SECTION III. ELIGIBILITY DATA SHEET

Eligibility Documents	
1.2	No further instructions.
1.3	No further instructions.
2.1(a)(i)	For corporations/partnerships: the following may also be submitted: Latest Articles of Incorporation/Partnership By-Laws duly approved by the Securities and Exchange Commission.
2.1(a)(iii)	Valid and Current Tax Clearance Certificate is required in this bidding.
2.1(a)(iv)	The Statement of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started shall include all such contracts prior to November 3, 2016 (see Annex C for format).  Likewise, the Statement of Government & Private Contracts Completed which are Similar in Nature shall be submitted (see Annex B for format).
2.1(a)(iv.7)	Proponent must show certification or any equivalent document from each of their client, as stated in the Statement of Completed Contracts form, that they are in good standing and have implemented similar projects (clause 9.1) to their client's expectations. <u>This particular requirement of submitting certification or equivalent document shall only apply to contracts that are similar in nature to the project at hand.</u>
2.1(a)(vi)	2015 Audited Financial Statements stamped received by the Bureau of Internal Revenue is required in this bidding.
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 Bldg. III, Ground Floor General Solano St., San Miguel, Manila
4.3(d)	The name of the Project is "Consultancy Services for the Design and Implementation of the DBM Careership Program on Public Financial Management (PFM)."
5	The address for submission of eligibility documents is BAC Conference Room, Ground Floor, DBM Building III, General Solano St., San Miguel, Manila.
8.1	The deadline for submission of eligibility documents is on November 3, 2016, 10:00 a.m., at the above-mentioned address.

9.1	Similar contracts shall refer to the conduct of cadetship/management training/career development programs focused on individual and organizational development.																
9.2	<p>Multi-level weighted scoring shall be used for the short listing of consultants. The number of short listed consultants shall consist of at most five (5) interested consultants who meet the minimum score for each criterion. The evaluation criteria are, as follows:</p> <table data-bbox="417 526 1368 680"> <tr> <td>Experience of the Consultant</td> <td>45%</td> </tr> <tr> <td>Qualifications of Personnel Assigned to the Project</td> <td>40%</td> </tr> <tr> <td>Current Workload Relative to Job Capacity</td> <td>15%</td> </tr> <tr> <td style="text-align: right;"><b>Total</b></td> <td><b>100%</b></td> </tr> </table> <p>The minimum required for each criterion is, as follows:</p> <table data-bbox="417 789 1368 943"> <tr> <td>Experience of the Consultant</td> <td>31.5%</td> </tr> <tr> <td>Qualifications of Personnel Assigned to the Project</td> <td>28%</td> </tr> <tr> <td>Current Workload Relative to Job Capacity</td> <td>10.5%</td> </tr> <tr> <td style="text-align: right;"><b>Total</b></td> <td><b>70%</b></td> </tr> </table> <p>Scoring shall be based on the eligibility documents submitted.</p> <p>The BAC shall then rank the interested consultants in descending order based on the total score, and identify the top five (5) potential consultants. Should less than five (5) potential consultants 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>	Experience of the Consultant	45%	Qualifications of Personnel Assigned to the Project	40%	Current Workload Relative to Job Capacity	15%	<b>Total</b>	<b>100%</b>	Experience of the Consultant	31.5%	Qualifications of Personnel Assigned to the Project	28%	Current Workload Relative to Job Capacity	10.5%	<b>Total</b>	<b>70%</b>
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Qualifications of Personnel Assigned to the Project	28%																
Current Workload Relative to Job Capacity	10.5%																
<b>Total</b>	<b>70%</b>																

## SECTION IV. BIDDING FORMS

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**ELIGIBILITY DOCUMENTS SUBMISSION FORM**

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*[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 Consultancy Services for the Design and Implementation of the DBM Careership Program on Public Financial Management (PFM), *[Name of Consultant]* hereby expresses interest in participating in the eligibility and short listing for said Project and submits the attached eligibility documents in compliance with the Eligibility Documents 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
- 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

(ANNEX B)

*Statement of all Government & 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 & Signature)

Designation : \_\_\_\_\_

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

Instructions:

- a) Projects should be completed within the two (2) years immediately preceding November 3, 2016.
- 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 conduct of cadetship/management training/career development programs focused on individual and organizational development.

**Statement of all Ongoing Government & 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 & 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 November 3, 2016.
- ii. If there is no ongoing contract including those 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 of the Consultancy Services for the Design and Implementation of the DBM Careership Program on Public Financial Management (PFM), I/we hereby declare the following:

1. [Select one and delete the rest].

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

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

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

2. That the following are/is 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 Curricula 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)***



(ANNEX E)

**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

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:					
<b>Personal Information</b>					
Name of Staff					
Address		Contact No.	Email Address		
Date of Birth		Citizenship	Civil Status		
<b>Work Experience (start from the current employment)</b>					
Company Name	Inclusive Dates		Total (Years, Months)	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** *(start from the most recent)*

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.

\_\_\_\_\_

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

Signature





(ANNEX F)

**REPUBLIC OF THE PHILIPPINES**  
**DEPARTMENT OF BUDGET AND MANAGEMENT**  
GENERAL SOLANO STREET, SAN MIGUEL, MANILA

***TERMS OF REFERENCE***

**CONSULTANCY SERVICES FOR THE DESIGN AND IMPLEMENTATION OF THE  
DBM CAREERSHIP PROGRAM ON PUBLIC FINANCIAL MANAGEMENT (PFM)**

**I. Introduction**

The Department of Budget and Management is cognizant of the continuing need to improve the reporting of performance information of implementing agencies and ultimately address the timely and effective delivery of public goods and services. It also recognizes the need for a ready pool of public financial management (PFM) practitioners in the bureaucracy that other government agencies can tap. Internally, the organization is equally in need of succession planning with its aging human resource complement. For these reasons, the DBM shall establish a cadre of young professionals through a DBM Careership Program on PFM which aims to have a ready pool of competent and committed young professionals to be trained as “monitors” or M&E practitioners who will eventually join the ranks of PFM experts in the department. Together with the existing personnel, they will also be potential successors to the senior and middle managers who will retire in 3 to 5 years or be promoted to higher positions. The strategy in building the careership program will both address the “farm of PFM experts” and the issue on “succession” due to promotion and retirement over a period of five years.

The new recruits as well as existing staff will also be cross-posted as learning buddies of the implementing agencies to enable both parties to learn from each other. They should be able to build a learning culture rather than a fault-finding scenario. This is similar to the internship scheme with a twist, i.e., two-way learning process rather than a one-way mode of learning.

Succeeding rounds of the DCP/PFM program for new recruits will be repeated/relaunched as needed.

## II. Objectives

The objectives of the Consultancy Services are to be able to:

- Design policies and guidelines for the implementation and institutionalization of a DBM Careership Program on PFM;
- Establish the competency standards of a DBM Cadet;
- Develop the capability of a pool of DBM resource persons who will train, coach and mentor the cadets;
- Assist in the recruitment and selection of qualified cadets for the program;
- Design and implement a training program that will develop the technical competency and leadership skills of DBM cadets; and
- Evaluate the program and provide recommendations.

## III. Scope of Work, Component schedule and outputs

The complete cycle of the DBM Careership Program on PFM will approximately take twelve (12) months. The following table outlines the project components, the schedule of activities to be done as well as the deliverables to be provided by the consultant, and the payment tranches:

Date/Duration	Activity	Output/Deliverable	Contract Amount
<b>Phase I. Program Design and Development</b>			
January to February 2017	Identification of the behavioral and functional competencies	Competency Standard	15% of the tranche of payment upon approval of Program Design
	Preparation of instructional materials	Training Modules	
	Preparation of assessments (quizzes, tests, reports and projects)	Assessments	
	Setting up of policy manuals, job description, guidelines, SOPs, etc.	Policies and Procedures	

<b>Phase II – Capability Development of Resource Persons (Training of Trainers)</b>			
January to February 2017	Identification and selection of technical/subject matter professionals who can be resource persons	Nomination of RPs	25% of the tranche of payment upon completion of ToT and selection of candidates
	Training, mentoring and coaching of RPs	Capacity Building of RPs	
<b>Phase III – Recruitment and Selection of Candidates</b>			
January to March 2017	Advertising through newspapers, websites, school job fairs, etc.	Recruitment Campaign	
	Evaluation of submission from candidates	Recruitment Processing	
	Conduct of interviews and written admission tests for the candidates	Interview and Examination	
	Selection of candidates	Profile / List of Selected Candidates	
<b>Phase IV – Program Delivery and Implementation</b>			
April to November 2017	Conduct of various modules of training for candidates	Classroom Studies	35% of the tranche of payment upon completion of training and deployment of the DBM cadets
	Immersion in different DBM units	On-the-Job Learning Experience	
	Preparing a project proposal on innovation, technologies and improvement of systems and procedures of a selected DBM unit	Culminating Project	
	Placement of cadets to various DBM units based on the choice of cadets and of the DBM management	Deployment	

<b>Phase V – Program Evaluation</b>			
December 2017 (and after a year of deployment)	Preparation of monitoring reports and other pertinent documents for each main learning activity	Monitoring	25% of the tranche of payment upon submission of the manuals and program terminal reports
	Identifying the best practice of the Program as well as the aspects for improvement	Evaluation	
	Providing clear suggestions for continuous improvement of the program; actual application of amendment for the next cycle of the program	Recommendation and Adjustments	
	Conduct of assessment on the performance of the cadets after a year of deployment	Post-implementation assessment and evaluation	

#### **IV. Expertise/Qualifications of Consultant**

The Consultant must have carried out similar scope of works and be able to demonstrate completion of a previous similar single service contract. The following table shows the qualification requirements for the key personnel of the Consultant who shall constitute the Project Team:

<b>Designation</b>	<b>Responsibility</b>	<b>Qualifications</b>
Overall Project Manager	Overall Management of the Project – accountable in ensuring that every aspect of the project and deliverables are met	<ul style="list-style-type: none"> <li>• Minimum: Bachelor's Degree in business administration/behavioral/social science or other relevant degree</li> <li>• With at least 15 years of experience in Human Resource Management and Organizational Development</li> <li>• With at least 10 years of professional experience in establishing and managing learning facilities/management development centers locally and internationally</li> </ul>

		<ul style="list-style-type: none"> <li>• With at least 10 years of cadet program experience in the public sector and/or private sector (preferably with operation that affects general public interest)</li> <li>• Has excellent and proven project management skills</li> <li>• Has excellent communication skills</li> <li>• International exposure or experience is an advantage</li> </ul>
Project Leader for Recruitment and Selection of Cadets	Recruitment and Selection of Cadets	<ul style="list-style-type: none"> <li>• Minimum: Bachelor's Degree in business administration/behavioral/social science or other relevant degree</li> <li>• With at least 10 years of professional experience in general HR and recruitment, preferably in cadet programs</li> <li>• Highly knowledgeable in recruitment campaign, screening and selection</li> <li>• Has excellent project management skills</li> <li>• Has excellent communication skills</li> </ul>
Recruitment Team (minimum of 2 members)	Actual implementation of Recruitment and Selection Process	<ul style="list-style-type: none"> <li>• Minimum: Bachelor's Degree in business administration/behavioral/social science or other relevant degree</li> <li>• Has professional experience in recruiting fresh college graduates</li> <li>• Has professional experience in preparing advertising materials, administering recruitment tools including interviews and tests, and safekeeping of records/documents</li> </ul>
Project Leader for Training and Development	Management of Curriculum & Course Development, Program Implementation & Evaluation, and Training of Trainers (internal Subject Matter Experts or Technical Experts)	<ul style="list-style-type: none"> <li>• Minimum: Bachelor's Degree in business administration/behavioral/social science or other relevant degree</li> <li>• With at least 5 years of professional experience in management, development and implementation of Technical Training Programs (adult learning or corporate learning set-up)</li> </ul>

		<ul style="list-style-type: none"> <li>• Professional experience in training of trainers (preferably Technical Trainers)</li> <li>• Has excellent project management skills</li> <li>• Has excellent communication skills</li> <li>• Experience in working with a professional/technical group or government institution that develops industry standards in Training &amp; Development is an advantage</li> </ul>
Training Consultant for Training of Trainers	Deliver the Training Workshop for Resource Person Development	<ul style="list-style-type: none"> <li>• Minimum: Bachelor's Degree in business administration/behavioral/social science or other relevant degree</li> <li>• With at least 12 years of experience in training of trainers</li> <li>• Expert in professional training and development</li> </ul>
Development and Implementation Team (minimum of 5 members that may be assigned in the different phases of the project)	To support both the development process and implementation stage of the project	<ul style="list-style-type: none"> <li>• Minimum: Bachelor's Degree in business administration/behavioral/social science or other relevant degree</li> <li>• Has professional experience in learning process development and implementation</li> <li>• Team members to be assigned in the development phases must have at least a year of experience in the area</li> <li>• Team members to be assigned in the implementation phase must have at least a year of experience in the area</li> </ul>

#### V. Services/Facilities to be Provided by the DBM

The DBM shall:

- Constitute a Team to work with the Consultant;
- Provide the Consultant with the necessary documents and other relevant materials as inputs to the design and implementation of agreed activities;
- Provide training equipment such as computers and multi-media projector, reproduction of materials, and training venue;
- Identify and select possible technical personnel who can be resource persons for the DBM Careership Program on PFM; and

- Make the final decision on the recruitment and selection of candidates who will undertake the program.

*Handwritten mark*