



REPUBLIC OF THE PHILIPPINES

NATIONAL ECONOMIC AND DEVELOPMENT AUTHORITY

REQUEST FOR PROPOSALS (RFP)

FOR THE SMALL VALUE PROCUREMENT OF A KNOWLEDGE MANAGEMENT CONSULTANT

The National Economic and Development Authority (NEDA) intends to engage the services of an Individual Knowledge Management Consultant in the sum of ***Eight Hundred Fifty Thousand Pesos (PhP 850,000)***, inclusive of all applicable government taxes and charges, professional fees, and other incidental and administrative costs through Small Value Procurement (SVP). Details of the project are in the attached Terms of Reference (TOR).

Interested bidders are required to submit one (1) original copy and four (4) copies of the following documents to the NEDA Bids and Awards Committee for Consulting Services (NBAC-CS) on or before **06 November 2017, 12NN** at the 5th Floor, OASEC-PP, NEDA Building, #12 Saint Josemaria Escriva Drive, Ortigas Center, Pasig City:

Technical Proposal

1. Curriculum Vitae (please use attached format);
2. List of all ongoing/committed contracts and completed contracts in the last ten (10) years (please use attached format);
3. List of Top Three (3) Clients from the government and private institutions for the past 5 years (in terms of total value of contract/s) (please use attached format);
4. Project Proposal;
5. PhilGEPS Registration Number;
6. Income or Business Tax Return/Tax Clearance;
7. BIR Certificate of Registration;
8. Omnibus Sworn Statement using GPPB-prescribed Form; and

Financial Proposal

9. Financial Proposal (must be inclusive of all applicable government taxes and charges).

The technical proposal and the financial proposal shall be submitted in two (2) separate sealed envelopes marked "Technical Proposal" and "Financial Proposal", respectively, both all containing the name/title of the procurement. Late submissions shall not be accepted. Opening of technical proposals shall be on **06 November 2017, 1:30PM** at the DIS Conference Room, G/F NEDA Building, #12 Saint Josemaria Escriva Drive, Ortigas Center, Pasig City. Representative/s should bring a letter addressed to the NBAC-CS Chair certifying that the representative/s has/have authority to speak for and in behalf of the Consultant.

Technical proposals shall be evaluated using the Quality Based Selection/Evaluation (QBSE) procedure. The evaluation shall be based on the following criteria:

Criteria	Weight
a. Qualifications of the Consultant Education Training Experience List of Top 3 Clients	30%
b. Plan of Approach and Methodology Substance of the Proposal Completeness of the Proposal Clarity of Research Methods and Approaches	50%
c. Current Workload Relative to Capacity	20%

The Consultant must attain a hurdle rate of 70% to be considered based on the abovementioned set of selection criteria.

NEDA reserves the right to waive any minor deviation in the submitted documents which will not materially affect the substance of the proposal, annul the procurement/bidding process, or not award the contract without thereby incurring any liability to the affected participating Consultant/s.

For further information, please contact the NBAC-CS Secretariat:

*2/F NEDA-sa-Pasig Building
#12 Saint Josemaria Escriva Drive, Ortigas Center, Pasig City 1605
(02) 631-3754 / (02) 631-0960 to 65 local 207
Fax Nos. (02) 631-3736*

Issued on 18 October 2017.


CARLOS BERNARDO O. ABAD SANTOS
Assistant Secretary
and Chairperson, NBAC-CS

FORMAT OF CURRICULUM VITAE (CV)

Proposed Position: _____

Name of Firm: _____

Name of Staff: _____

Profession: _____

Date of Birth: _____

Years with Firm/Entity: _____ Nationality: _____

Membership in Professional Societies: _____

Detailed Tasks Assigned: _____

Key Qualifications:

[Give an outline of staff member's experience and training most pertinent to tasks on project (in months and years with detailed description/discussion on the nature and scope of work). Describe degree of responsibility held by staff member on relevant previous projects and give dates and locations.]

Education:

[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained.]

Employment Record:

[Starting with present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in last twenty years (in man-months), also indicate role played and types of activities performed and client references, where appropriate. Failure to indicate details of role and duration shall merit zero points. For academic/teaching engagements, the subjects/courses should be indicated including the number of hours per week taught.]

Trainings Attended:

[Summarize trainings/seminars attended as participant indicating topic and specific duration (in hours/days). **Failure to indicate details shall merit zero points.**]

Languages:

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

Certification:

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

[Signature of staff member and authorized representative of the firm] Date: _____
Day/Month/Year

Full name of staff member: _____

Full name of authorized representative: _____

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

Witness my hand and seal this ____ day of [month] [year].

NAME OF NOTARY PUBLIC

Serial No. of Commission _____

Notary Public for _____ **until** _____

Roll of Attorneys No. _____

PTR No. __, [date issued], [place issued]

IBP No. __, [date issued], [place issued]

Doc. No. ____

Page No. ____

Book No. ____

Series of ____.

STATEMENT OF COMPLETED CONTRACTS

Statement of Completed Contracts

This is to certify that _____ has the following completed contracts for the period CY _____

Name and Location of the Contract	Date of Award of the Contract	Type and Brief Description of Consulting Services	Consultant's Role (Main Consultant, Sub-Contractor, Partner in a JV, etc.)	Amount of Contract	Contract Duration	Proof/Certificate of Satisfactory Completion or Equivalent Document Issued by at Least One (1) Client (Separate Sheet)
			Note: Include description of the activities conducted /undertaken by the consultant.		Note: Include month/s and year/s for studies	

Name and Signature of Authorized Representative

Date

Instructions:

- Cut-off date: The day before the deadline of submission of eligibility documents.
- State completed contracts for the last ten (10) years. Contracts that are similar to the project being procured/bid in terms of nature and amount shall be prioritized in inclusion in the list.

STATEMENT OF ONGOING AND AWARDED BUT NOT YET STARTED CONTRACTS

Statement of Ongoing and Awarded But Not Yet Started Contracts

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

Name and Location of the Contract	Date of Award of the Contract	Type and Brief Description of Consulting Services	Consultant's Role (Main Consultant, Sub-contractor, Partner in a JV, etc.)	Amount of Contract	Contract Duration	Remarks
			Note: Include description of the activities to be conducted/undertaken by the consultant.		Note: Include month/s and year/s for studies	

Name and Signature of Authorized Representative

Date

Instructions:

- a) 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 called for procurement/bidding) as of the day before the deadline of submission of eligibility documents.
- b) If there is no ongoing contract including awarded but not yet started as of the aforementioned period, state none or equivalent term.

**PROCUREMENT OF SERVICES OF A KNOWLEDGE MANAGEMENT
CONSULTANT**

TOP 3 CLIENTS

1. List of top 3 clients from the government and private institutions for the past 5 years (in terms of total value of contract/s).
2. Attach as Annex/es **at least one (1) Certificate of Satisfactory Service or equivalent certification from any one.**

CLIENT'S NAME	TOTAL VALUE OF CONTRACT/S (in PhP)
a.	
b.	
c.	

I/We hereby certify that all information stated above are true and correct. I/We hereby authorize the National Economic and Development Authority to request supporting documents or written proof of information stated above, as needed.

Name and signature

Consultant

Date:

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

Witness my hand and seal this ____ day of *[month]* *[year]*.

NAME OF NOTARY PUBLIC

Serial No. of Commission _____

Notary Public for _____ until _____

Roll of Attorneys No. _____

PTR No. __, *[date issued]*, *[place issued]*

IBP No. __, *[date issued]*, *[place issued]*

Doc. No. ____

Page No. ____

Book No. ____

Series of ____.

OMNIBUS SWORN STATEMENT

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

AFFIDAVIT

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

1. *Select one, delete the other:*

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

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

2. *Select one, delete the other:*

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

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

3. *[Name of Consultant]* is not “blacklisted” or barred from bidding by the Government of the Philippines or any of its agencies, offices, corporations, or Local Government Units, foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board;
4. Each of the documents submitted in satisfaction of the bidding requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct;

5. *[Name of Consultant]* is authorizing the Head of the Procuring Entity or its duly authorized representative(s) to verify all the documents submitted;

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

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

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

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

7. *[Name of Consultant]* complies with existing labor laws and standards; and
8. *[Name of Consultant]* is aware of and has undertaken the following responsibilities as a Bidder:
- a) Carefully examine all of the Bidding Documents;
 - b) Acknowledge all conditions, local or otherwise, affecting the implementation of the Contract;
 - c) Made an estimate of the facilities available and needed for the contract to be bid, if any; and
 - d) Inquire or secure Supplemental/Bid Bulletin(s) issued for the *[Name of the Project]*.
9. *[Name of Bidder]* did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel or representative of the government in relation to any procurement project or activity.

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

[Bidder's Representative/Authorized Signatory]

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

Witness my hand and seal this ____ day of *[month]* *[year]*.

NAME OF NOTARY PUBLIC

Serial No. of Commission _____

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Doc. No. _____

Page No. _____

Book No. _____

Series of _____.

TECHNICAL PROPOSAL SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

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

In accordance with **ITB** Clause 21.1, we confirm that the information contained in the eligibility documents submitted earlier together with the Expression of Interest remain correct as of the date of bid submission.

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

In accordance with **GCC** Clause 51, we acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Bid or not.

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

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

We remain,

Yours sincerely,

Authorized Signature:
Name and Title of Signatory:
Name of Firm:
Address:

CONSULTANT'S REFERENCES

Relevant Services Carried Out in the Last Ten (10) Years That Best Illustrate Qualifications

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

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

Consultant's Name: _____

**COMMENTS AND SUGGESTIONS OF CONSULTANT ON THE TERMS OF REFERENCE
AND ON DATA, SERVICES, AND FACILITIES TO BE PROVIDED BY THE PROCURING
ENTITY**

On the Terms of Reference:

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

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

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

DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR PERFORMING THE PROJECT

TIME SCHEDULE FOR PROFESSIONAL PERSONNEL

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

Full-time:
Reports Due:
Activities Duration:
Location

Part-time: _____

Signature: _____
(Authorized representative)

Full Name: _____
Title: _____
Address: _____

ACTIVITY (WORK) SCHEDULE

A. Field Investigation and Study Items

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

B. Completion and Submission of Reports

Reports	Date
1. Inception Report	
2. Training / mentoring program	
3. KM Assessment Report	
4. Specifications of features and functionalities of an ICT-enabled KM system and menu of options, including cost-benefit analysis, and possible phases of implementation, based on approved KM process flow	
5. Terminal Report and proposed implementation plan for ICT-enabled KM system	

FINANCIAL PROPOSAL SUBMISSION FORM

[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

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

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

In accordance with **GCC Clause Error! Reference source not found.**, we acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Bid.

We confirm that we have read, understood and accept the contents of the Instructions to Bidders (ITB), the Bid Data Sheet (BDS), General Conditions of Contract (GCC), Special Conditions of Contract (SCC), Terms of Reference (TOR), the provisions relating to the eligibility of Consultant and the applicable guidelines for the procurement rules of the Funding Source, any and all Bid bulletins issued and other attachments and inclusions included in the Bidding Documents sent to us.

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

We remain,

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

SUMMARY OF COSTS

Costs	Currency(ies) ¹	Amount in Philippine Peso
Subtotal		
Local Taxes		
Total Amount of Financial Proposal		

¹ In cases of contracts involving foreign consultants, indicate the exchange rate used.

BREAKDOWN OF REMUNERATION PER ACTIVITY

Activity No. _____ Name: _____

Name	Position	Input ²	Remuneration Currency(ies) Rate	Amount

² Staff months, days, or hours as appropriate.