



## REQUEST FOR EXPRESSION OF INTEREST No. 2023-020

### PROCUREMENT OF A CONSULTING FIRM FOR THE DEVELOPMENT AND ENHANCEMENT OF NATIONAL AND CORRIDOR-LEVEL COMMUNICATIONS PLANS AND CORRIDOR BASELINE AWARENESS INSTRUMENTS FOR THE BIODIVERSITY CORRIDOR PROJECT

1. The Government of the Philippines (GoP) has received a *Grant* from the *United Nations Development Program (UNDP)* through the *Biodiversity Corridor Project* toward the cost of *Two Million Eight Hundred Thirty One Thousand Seven Hundred Pesos (P2,831,700.00)*, and it intends to apply part of the proceeds of this *Grant* to payments under the contract for the *Procurement of a Consulting Firm for the Development and Enhancement of National and Corridor-Level Communications Plans and Corridor Baseline Awareness Instruments for the Biodiversity Corridor Project*.
2. The Biodiversity Management Bureau now calls for the submission of eligibility documents for the subject services. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before *June 1, 2023* not later than *1:00pm* at the *BAC Secretariat at the Ninoy Aquino Parks and Wildlife Center, Quezon Avenue, Diliman, Quezon City*. Applications for eligibility will be evaluated based on a non-discretionary "pass/fail" criterion.
3. Interested bidders may obtain further information from BMB-BAC Secretariat and inspect the Bidding Documents at the address given below from Monday to Friday, 8:00 a.m. to 5:00p.m.
4. A complete set of Bidding Documents may be acquired by interested Bidders on *May 18, 2023* from the address below.

It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.

5. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the "Government Procurement Reform Act", and its Implementing Rules and Regulations (IRR). The short list shall consist of top five (5) prospective bidders who will be entitled to submit bids. The criteria and rating system for shortlisting are:

CRITERIA	WEIGHT
1. <i>Track Record of Consulting Firm</i>	55
2. <i>Individual Qualifications of Team Members</i>	45
<b>TOTAL</b>	<b>100</b>
<b>PASSING RATE</b>	<b>70</b>

6. Bidding will be conducted in accordance with relevant procedures for open competitive bidding as specified in the IRR of RA 9184 with some amendments, as stated in these bidding documents and is open to all bidders from eligible source countries as defined in the applicable guidelines of the United Nations Development Programme (UNDP).
7. The Procuring Entity 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 six (6) months.
9. The *Biodiversity Management Bureau* reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
10. For further information, please refer to:

*The Head*  
*BAC Secretariat*  
*Biodiversity Management Bureau*  
*Ninoy Aquino Parks and Wildlife Center*  
*Quezon Avenue, Diliman, Quezon City*  
*Telephone No. (02) 8924-6031 to 35 local 221*  
*E-mail: [bacsec@bmb.gov.ph](mailto:bacsec@bmb.gov.ph)*

  
ANSON M. TACATA  
Chairperson, BAC





**DEPARTMENT OF ENVIRONMENT AND NATURAL RESOURCES  
BIODIVERSITY MANAGEMENT BUREAU**

QUEZON AVE., DILIMAN, QUEZON CITY

Tel. No. (632) 8 924 6031-25 | Fax (632) 8 924 0109, (632) 8 920 4417

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# **BIDDING DOCUMENTS**

**“PROCUREMENT OF A CONSULTING FIRM FOR  
THE DEVELOPMENT AND ENHANCEMENT OF  
NATIONAL AND CORRIDOR-LEVEL  
COMMUNICATIONS PLANS AND CORRIDOR  
BASELINE AWARENESS INSTRUMENTS FOR THE  
BIODIVERSITY CORRIDOR PROJECT  
ABC: P2,831,700.00**

**PART I**

**BIDS AND AWARDS  
COMMITTEE**

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Section I. Request for Expression of  
Interest



## REQUEST FOR EXPRESSION OF INTEREST

No. 2023-020

### PROCUREMENT OF A CONSULTING FIRM FOR THE DEVELOPMENT AND ENHANCEMENT OF NATIONAL AND CORRIDOR-LEVEL COMMUNICATIONS PLANS AND CORRIDOR BASELINE AWARENESS INSTRUMENTS FOR THE BIODIVERSITY CORRIDOR PROJECT

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8. The contract shall be completed within six (6) months.
9. The *Biodiversity Management Bureau* reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
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BAC Secretariat  
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Quezon Avenue, Diliman, Quezon City  
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E-mail: [bacsec@hmb.gov.ph](mailto:bacsec@hmb.gov.ph)*

**ANSON M. TAGTAG**  
Chairperson, BAC



## TERMS OF REFERENCE

### PROCUREMENT OF A CONSULTING FIRM FOR THE DEVELOPMENT AND ENHANCEMENT OF NATIONAL AND CORRIDOR-LEVEL COMMUNICATIONS PLANS AND CORRIDOR BASELINE AWARENESS INSTRUMENTS FOR THE BIODIVERSITY CORRIDOR PROJECT

#### I. BACKGROUND AND RATIONALE

The Department of Environment and Natural Resources (DENR), with funding from the Global Environment Facility (GEF) and support from the United Nations Development Program (UNDP), is implementing the project entitled "**Integrated Approach in Management of Major Biodiversity Corridors in the Philippines**" or **BD Corridor Project**. The Project aims to operationalize integrated management of biodiversity corridors to generate multiple benefits including effective conservation of globally threatened species and high conservation value forests, reduce deforestation and degradation, and enhance local biodiversity-friendly livelihoods. This Project has four components, namely:

- **Component 1:** Effective coordination and governance framework for integrated ecosystem management in the Philippines biodiversity corridors system;
- **Component 2:** Application of integrated network design and management of biodiversity corridors to ensure continued stability and sustainability of their biological, ecosystem services and socio-economic conservation values;
- **Component 3:** Community-based sustainable use and management systems in the two pilot biodiversity corridor systems in the Philippines; and
- **Component 4:** Knowledge management, gender mainstreaming, learning, monitoring and evaluation.

One of the Project Results Indicators is **Indicator 13**, referring to the level of awareness on Integrated Ecosystems Management (IEM) within the biodiversity corridors as indicated by the Knowledge-Attitude-Practice (KAP) survey. In particular, the Project Document noted the baseline, mid-term and end-of-project targets:

- **Baseline:** Coordinated outreach on conservation threats lacking. Limited awareness of impact of unplanned development among general public. Baseline survey established;
- **Mid-Term:** At least 40% of sampled community members, government and sector agency staff, private sector and other stakeholders (at least 40% women) aware of potential conservation threats and adverse impacts of unplanned developments and actions needed for corridor conservation; and
- **End-of-Project:** At least 60% (of which at least 40% women) of sampled community members, government and sector agency staff, private sector and other stakeholders aware of potential conservation threats and adverse impacts of unplanned developments and behavior change for biodiversity outcomes.

The KAP approach will collect qualitative reference and quantitative declarative information on misunderstanding and barriers to behavior change, using appropriate tools including survey



questionnaires, Focus Group Discussions (FGDs) and Key Informant Interviews (KIIs), among others. Through the conduct of the KAP baseline survey on IEM and Other Effective Conservation Measures (OECMs), the BD Corridor Project will be able to determine the levels of awareness and support among key target audiences. Based on the results of the KAP survey, a Communications Plan at the National level shall be reviewed and enhanced, and a Communications Plan at the Corridor level developed and implemented.

In addition, a major component of the Project focuses on Knowledge Management (KM) and Communication, Education and Public Awareness (CEPA). In order to enhance the internalization of transformative change for its stakeholders, the Project will initiate KM and communications strategies and action plans to support its three components of national policy, application in two biodiversity corridors, and support to community action; and its three phases of activities in the two corridors, specifically negotiating consensus, demonstration and learning, and mainstreaming.

## **II. OBJECTIVES**

The specific objectives of this Consultancy are to:

1. Conduct a KAP survey to:
  - a. Determine the knowledge level of key stakeholders and policy makers on IEM and OECMs;
  - b. Determine the attitude of target stakeholders and policy makers towards supporting integrated approaches and activities in ecosystem management, biodiversity conservation, sustainable land and forest management, indigenous and other local conservation measures, among others;
  - c. Identify management practices that can either facilitate or hinder IEM and OECM approaches and activities to improve national biodiversity corridor management;
  - d. Discuss the factors that affect or conditions that shape the knowledge, attitude, practices, and information sources of the stakeholders; and
2. Review and enhance the initial Communications Plan and Branding Guidelines, develop and implement the Corridor-level Communications Plan, and develop communications materials and collaterals with appropriate messaging for these materials/collaterals and appropriate audience segmentation.

## **III. SCOPE OF WORK**

The scope of work will include:

- A. Conduct of KAP Survey
  1. Review the Project Document and its relevant Annexes, including the Knowledge Management and Communications Strategy, as well as review and enhance the initial Communications Plan;
  2. Review and enhance existing KAP policies and related manuals, including survey instruments (paper- and tablet-based format) for quantitative and qualitative survey methodologies;

3. Enhance and/or develop the KAP survey design, questionnaire and methodologies, with focus on IEM and terrestrial biodiversity conservation;
4. Develop sampling design to identify target respondents of survey and conduct pre-test of finalized/enhanced KAP survey instrument(s);
5. Conduct the baseline survey covering the three regions in the two pilot biodiversity corridors of Mindoro (Oriental and Occidental Mindoro) and Eastern Mindanao, in particular CARAGA (Agusan del Norte and Sur, Surigao del Norte and Sur, except Dinagat and Siargao Islands) and Davao (Davao Oriental and de Oro);
6. Conduct KIIs and FGDs, as may be necessary;
7. Analyze and interpret results, and submit report on the results of the KAP survey; and
8. Liaise/coordinate and consult with CPMUs and concerned Regional Offices, as necessary.
9. Capacitate/train DENR and Project field personnel in the conduct of KAP surveys.

#### B. Preparation of the National- and Corridor-Level Communications Plans

1. Review and enhance the initial Communications Plan and Branding Guidelines.
2. Design targeted communications plans (National and Corridor levels) based on segmentation of stakeholders/audiences to target incremental behavioral changes and based on the result of the roll-out of the BMB KAP TB survey questionnaire.
3. Develop communications materials and collaterals (e.g., print, digital, and other innovative products/materials such as mobile/modular exhibits), with key positioning messages appropriate to audience segments.
4. Develop and/or upload digital media posts (e.g., FaceBook, You Tube, Website) once a week for the last two (2) months of the total engagement duration and boost the posts in FB pages.
5. Launch the BD Corridor communications plan in major environment event (e.g., IDBD, Eagle Week, IP Month, etc.).

The scope of work of this Terms of Reference is beyond the optimum in-house capability of the procuring entity and is consistent with the Government's policy not to compete with the private sector as integrated in Item 2 of Annex "B" of the 2016 Implementing Rules and Regulation of RA 9184.

#### IV. DURATION

The services of the Consulting Firm shall be engaged continuously for a period of six (6) months effective upon signing of the contract and Notice to Proceed.

#### V. DELIVERABLES AND REPORTING ARRANGEMENTS

The Consulting Firm shall work closely with the DENR-BMB and concerned DENR Regional Offices for progress and updates on the consultancy assignment and shall submit the following deliverables:



1. Inception Report with Work Plan
2. KAP Baseline Survey
  - a. Enhanced survey questionnaires
  - b. KII and FGD guides
  - c. Cover letters for sample respondents
  - d. Informed consent forms
  - e. Training/capacitation of enumerators and documentation of training
  - f. Survey design/methodology
  - g. Pre-test questionnaire (paper and/or tablet-based)
  - h. Final survey questionnaire (paper and/or tablet-based)
  - i. Enhanced manual and survey instrument tools and protocols
  - j. Final report on KAP survey
3. Communications Plan
  - a. Draft national communication plan
  - b. Draft and final corridor-targeted and audience-segmented communications plans
  - c. Documentation of best practices in communications campaigns
  - d. CEPA/KM materials/products including mobile/modular exhibit materials
  - e. Digital media posts and boosting
  - f. Launching of BD Corridor comms plan in BD event
4. Presentation of the Draft Report of Consultancy
5. Final Report

*Note: Item 2 (b,c,d and g) must be submitted in Bisaya, Tagalog and English versions*

## **VI. QUALIFICATIONS AND PROFESSIONAL REQUIREMENTS**

The Consulting Firm should meet the following minimum qualifications and requirements below:

1. Should have a minimum of five (5) years of experience in delivering services on Social Marketing, Social Mobilization, Linkaging and Alliance/Partnership Building, Risk Communication and Crisis Management, and Communication-Education-Public Awareness/Information-Education-Communication (CEPA/IEC) activities, including use of current/existing survey instruments.
2. Should have a minimum of five (5) years' experience in preparing, developing and implementing KAP surveys/research and communication action plans, especially those related to Natural Resources and Environmental Management.
3. Should have at least one (1) previous publications or published reports related to surveys on community perception, social marketing, research and mobilization.
4. Should have substantial manpower and experts to be able to provide the technical needs of the engagement.

## **VII. EDUCATIONAL BACKGROUND AND WORK EXPERIENCE**

### **1. Team Leader / KM-CEPA Specialist**

- Bachelor's Degree in development studies, social science, communications or any related field



- At least 5 years of experience in CEPA-related surveys, developing KM frameworks, CEPA campaigns especially on natural resource or ecosystem management
- Experience in conducting Social and Behavioral Change Communication (SBCC) campaigns
- Experience in drafting organizational KM (tacit and explicit knowledge capture) campaigns for different clients is a plus

## 2. Social Scientist / Consumer Marketing Specialist

- Bachelor's Degree in development studies, social science, communications or any related field
- Minimum of 5 years of experience in social surveys and research, in particular, on the conduct and assessment of KAP surveys
- Experience in conducting app-based or tablet-based surveys through data collection software

## 3. Statistician / Data Analyst

- Bachelor's Degree in statistics, data analytics, social science, or any related field
- Minimum of 3 years of experience as statistician/analyst in social surveys and research

### Method of Evaluation

The proposal will be evaluated using the Quality-Based Evaluation (QBE) based on RA 9184 and its IRR which will only consider the Technical Proposals in the ranking of consulting firm.

## VIII. APPROVED BUDGET FOR CONTRACT (ABC) AND PAYMENT SCHEDULE

The approved budget cost in the consultancy for the development and enhancement of the National and Corridor-Level Communication Plans and Corridor Baseline Awareness Instruments is **Two Million Eight Hundred Thirty-One Thousand Seven Hundred Pesos** only (Php2,831,700.00). The amount covers the remuneration for the conduct of the baseline surveys in the corridor sites and preparation of the corridor-level communications plans with audience segmentation, development of CEPA materials and survey questionnaires, among others.

## IX. EXPECTED OUTPUTS/ DELIVERABLES AND PAYMEN SCHEDULE

Expected Outputs/Deliverables	Percentage of Total Contract Cost	Breakdown of Budget (PhP)	Target Date for Payment
1 <sup>st</sup> Tranche Inception Report	15%	P424,755	Upon signing of the contract and submission and

			<p>acceptance of Inception Report which includes the ff.:</p> <ul style="list-style-type: none"> <li>• Proposed activities over the period of engagement, methodology, expected contribution to deliverables (assigned personnel, timetable, site, and how these will contribute to the expected output)</li> </ul>
2 <sup>nd</sup> Tranche Progress Report No. 1	20%	P566,340	<p>Upon submission and acceptance of Progress Report No. 1 which includes the ff.:</p> <ul style="list-style-type: none"> <li>• Development/enhancement of survey design and protocols, pre-test questionnaires, KII and FGD guides, cover letters for sample respondents and informed consent forms all available in English, Tagalog and Bisaya.</li> <li>• Documentation of meetings for survey methodology and training/capacitation of enumerators</li> </ul>
3 <sup>rd</sup> Tranche Progress Report No. 2	25%	P707,925	<p>Upon submission and acceptance of Progress Report No.2 which includes the ff.:</p> <ul style="list-style-type: none"> <li>• Administration of KAP survey using final survey questionnaire at national level and in pilot BD corridor areas of Mindoro, CARAGA (Agusan and Surigao provinces except Dinagat and Siargao), Davao (Davao de Oro and Oriental), complete with validation results</li> <li>• Report on KAP survey results and submission of survey questionnaires, protocols, KII/FGD guides</li> </ul>

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**EVALUATION CRITERIA FOR SHORTLISTING**

Criteria	Points
<b>Qualification of the Firm</b>	<b>(75)</b>
<b>1. Experience in preparing, developing and implementing KAP surveys/research (paper, app or tablet-based) especially those related to Natural Resources and Environmental Management</b>	<b>(25)</b>
• More than 6 years	25
• 5-6 years	20
<b>2. Experience in delivering social marketing/mobilization, linkaging and alliance/partnership building, risk communication and crisis management, and CEPA/IEC activities, including use of current/existing survey instruments.</b>	<b>(20)</b>
• More than 6 years	20
• 5-6 years	15
<b>3. Experience in developing Communication Plan or Branding Guidelines</b>	<b>(20)</b>
• more than 2 developed	20
• 1-2 developed	15
<b>4. Previous publications/reports related to surveys on community perception, social marketing, research and mobilization</b>	<b>(10)</b>
• 5 points per report/publications but not to exceed 15 points	
<b>Individual Qualifications of Team Members</b>	<b>(25)</b>
<b>Team Leader - years of experience in CEPA-related surveys, developing KM frameworks, CEPA campaigns especially on natural resource or ecosystem management</b>	<b>(25)</b>
• More than 5 years	10
• 5 years	5





<b>Social Scientist - years of experience in social surveys and research, in particular, on the conduct and assessment of KAP surveys</b>	<b>10)</b>
• More than 5 years	10
• 5 years	5
<b>Statistician/Data Analyst - years of experience as statistician/analyst in social surveys and research</b>	<b>(5)</b>
• More than 3 years	5
• 3 years	3
<b>TOTAL</b>	<b>100</b>
<b>PASSING RATE</b>	<b>70</b>

Prepared by:


  
**ROWENA F. BOLINAS**  
 End-User

  
**ELPIDIO B. GELERA, JR.**  
 Member, TWG

  
**ALITA D. SANGALANG**  
 Member, TWG

  
**MELODY ANN L. MALANO**  
 Member, TWG

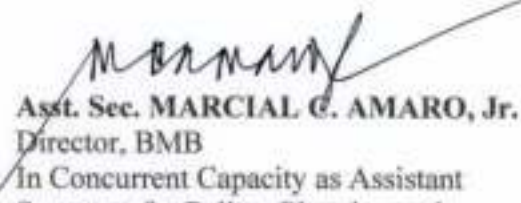
  
**ESTEVEN U. TOLEDO**  
 Vice-Chairperson, TWG

  
**DARWIN R. TEJERERO**  
 Chairperson, TWG

Recommended by:

  
**ANSON M. TAGTAG**  
 Chairperson, BAC

Approved by:

  
**Asst. Sec. MARCIAL C. AMARO, Jr.**  
 Director, BMB  
 In Concurrent Capacity as Assistant Secretary for Policy, Planning and Foreign-Assisted and Special Projects


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**TECHNICAL EVALUATION CRITERIA**

Criteria	Points
<b>Quality of Personnel to be Assigned to the Project</b>	<b>(40)</b>
<i>Education of Team Leader</i>	<b>(15)</b>
PhD/MA/MS	<i>15</i>
Bachelor's degree	<i>10</i>
<i>Experience of Team Leader</i>	<b>(25)</b>
5 sample outputs/reports on CEPA/KAP surveys, CEPA/SBCC or social marketing/ mobilization campaigns, KM frameworks/campaigns, etc.	<b>15</b>
<i>* 10 pts. for 5 sample. In excess of 5, 1 pt. each but not to exceed 15 pts</i>	
<b>Other Personnel</b>	<b>10</b>
<ul style="list-style-type: none"> <li>● Social Scientist/Consumer Marketing Specialist (3 sample outputs/reports/app on social surveys/research studies, CEPA/ KAP surveys, consumer marketing research, etc.)</li> <li>● Statistician/Data Analyst (3 sample outputs/reports/app on social surveys/research data analysis, CEPA/KAP survey/consumer marketing research data analysis, etc.)</li> </ul>	
<i>* 3 pts. for 3 samples. In excess of 3 samples per personnel, 1 pt. each but not to exceed 5 pts. for each personnel</i>	
<b>Plan of Approach and Methodology</b>	<b>(50)</b>
1. Substance of the Proposal as to Plan of Approach and interpretation of the Project Objectives and Deliverables	<b>(15)</b>
<ul style="list-style-type: none"> <li>● Understanding of the Project Objectives</li> <li>● Firm's Understanding of Technical Services to be provided</li> <li>● Quality and appropriateness of Methodology and Approach</li> <li>● Substance of the Proposal in addressing the Objective of the Project</li> </ul>	2 3 5 5
2. Completeness of Proposal, compliance with mandatory requirements as outlined in the approved Terms of Reference (TOR)	<b>(15)</b>
<ul style="list-style-type: none"> <li>● Compliance with the TOR</li> <li>● Appropriateness of schedule and duration of activities for each task and requirement</li> <li>● Quality of work program/plan</li> </ul>	5 5 5

3. Clarity of Methods and Approaches	(10)
• Innovativeness	4
• Proposal Presentation	3
• Applicability to local conditions	3
4. Total Man-Months and Manning Schedule	(10)
• Compatibility of Manning schedule with proposed work program	4
• Letter of Commitment of each personnel	3
• Total man-months proposed in relation to government estimates	3
<b>Experience and Capability of the Firm</b>	<b>(10)</b>
• 2 points for every previous engagement similar in nature but not to exceed 10 points	
<b>TOTAL</b>	<b>100</b>
<b>PASSING RATE</b>	<b>70</b>

Prepared by:

  
**ROWENA F. BOLINAS**  
 End-User *GC*

*on leave*  
**ELPIDIO B. GELERA, JR.**  
 Member, TWG

  
**ALITA D. SANGALANG**  
 Member, TWG

*on leave*  
**MELODY ANN L. MALANO**  
 Member, TWG


  
**ESTEVEN U. TOLEDO**  
 Vice-Chairperson, TWG

  
**DARWIN R. TEJERERO**  
 Chairperson, TWG

Recommended by:

  
**ANSON M. TAGTAG**  
 Chairperson, EAC

Approved by:

  
**MARCIAL C. AMARO, Jr.**  
 Director, BMB  
 In Concurrent Capacity as Assistant  
 Secretary for Policy, Planning and  
 Foreign-Assisted and Special Projects




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**COST ESTIMATES**

Particulars	Amount Total per Month in 6 Months	Amount Total in 6 Months
<b>Professional Fees</b>		
• Team Leader / KM-CEPA Specialist	P94,390/mo. x 6mos.	P 566,340.00
• Social Scientist / Consumer Marketing Specialist	56,634/mo. x 6mos.	339,804.00
• Statistician / Data Analyst	56,634/mo. x 6mos.	339,804.00
<b>Travel and Logistics</b>	66,073/mo. x 6mos.	396,438.00
<b>Communications and Printouts</b>	9,439/mo. x 6mos.	56,634.00
<b>Surveys, FGDs and KIIs</b>	141,585/mo. x 6mos.	849,510.00
<b>Administrative Costs</b>	47,195/mo. x 6mos.	283,170.00
<b>TOTAL AMOUNT</b>		<b>P2,831,700.00</b>

## **JUSTIFICATION**

This is to certify that the procurement of consultancy for developing and enhancing National and Corridor-Level Communication Plans and Corridor Baseline Awareness Instruments for the two corridors are highly technical outputs, and will therefore involve several specialists especially in the conduct of the Knowledge-Attitude-Practice (KAP) baseline survey and preparation, and that there are no current or existing personnel within the BD Corridor NPMU to do the required tasks. Thus, a Consulting Firm is necessary to perform the required tasks specified in the Terms of Reference.



**MARY JEAN A. CALEDA**  
National Project Manager,  
BD Corridor Project

## 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; 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 conditions stated in the **EDS**.
- 1.4. Government owned or -controlled corporations (GOCCs) 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 attached agencies of the Procuring Entity.

## 2. Eligibility Requirements

- 2.1. The following eligibility requirements, together with the Eligibility Documents Submission Form, shall be submitted on or before the date of the eligibility check specified in the Request for Expression of Interest and Clause 5 for purposes of determining eligibility of prospective bidders:

- (a) Class "A" Documents -

### Legal Documents

- (i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR, except for foreign bidders participating in the procurement by a Philippine Foreign Service Office or Post, which shall submit their eligibility documents under Section 24.1 of the IRR, provided, that the winning Consultant shall register with PhilGEPS in accordance with Section 37.1.4 of the IRR;

### *Technical Documents*

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

(b) Class "B" Document -

If applicable, the Joint Venture Agreement (JVA) in case the joint venture is already in existence, or duly notarized statements from all the potential joint venture partners in accordance with Section 24.1(b) of the IRR of RA 9184.

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.
- 2.3. 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, subconsultants 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.



### **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 Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.
- 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.

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

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL - ELIGIBILITY DOCUMENTS". Each copy thereof 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 ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
  - (c) contain the name of the contract to be bid in capital letters;
  - (d) bear the name and address of the prospective bidder in capital letters;
  - (e) be addressed to the Procuring Entity's BAC specified in the EDS;
  - (f) bear the specific identification of this Project indicated in the EDS; and
  - (g) bear a warning "DO NOT OPEN BEFORE..." the date and time for the opening of eligibility documents, in accordance with Clause 5.
- 4.4. Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

#### **b. 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.

#### **c. 6. Late Submission of Eligibility Documents**



Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 0 shall be declared "Late" and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder's name, its representative and the time the eligibility documents were submitted late.

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

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

- 8.1. The 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.

In case the submitted eligibility envelopes cannot be opened as scheduled due to justifiable reasons, the BAC shall take custody of the said envelopes and reschedule the opening on the next working day or at the soonest possible time through the issuance of a Notice of Postponement to be posted in the PhilGEPS website and the website of the Procuring Entity concerned.

- 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.
- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:
- (h) the name of the prospective bidder;
  - (i) whether there is a modification or substitution; and

- (j) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

8.4. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered "failed" for the particular eligibility requirement concerned. If a prospective bidder is rated "passed" for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "eligible." If a prospective bidder is rated "failed" in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "ineligible." In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

**f. 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 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 Notice of Eligibility and Short Listing issued by the BAC.

**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 IRR of RA 9184.

## Section III. Eligibility Data Sheet



## Eligibility Data Sheet

Eligibility Documents	
1.2	<i>Development and Enhancement of National and Corridor-Level Communications Plans and Corridor Baseline Awareness Instruments for the Biodiversity Corridor Project</i>
1.3	<p><i>Foreign consultants may be eligible to participate in this Project, subject to the following conditions to be complied within ten (10) days upon receipt of the Notice of Award:</i></p> <p style="margin-left: 40px;"><i>a) must be registered with the SEC and/or any agency authorized by the laws of the Philippines;</i></p> <p style="margin-left: 40px;"><i>b) when the types and fields of consulting services in which the foreign consultant wishes to engage involve the practice of regulated professions, the foreign consultant must be authorized by the appropriate GoP professional regulatory body specified in Clause 1.2 to engage in the practice of those professions and allied professions: Provided, however, That the limits of such authority shall be strictly observed.</i></p>
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within <i>five (5) years</i> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	<p><i>State acceptable proof of satisfactory completion of completed contracts.</i></p> <p><i>Performance Evaluation and Rating from clients</i></p> <p><i>Certificate of Acceptance</i></p>
0	Each prospective bidder shall submit one (1) original and <i>two (2) copies</i> of its eligibility documents.
(e)	<p><i>State the Bids and Awards Committee of the Procuring Entity concerned with the Project.</i></p> <p style="margin-left: 40px;"><i>Anson M. Tagtag - Chairperson</i></p> <p style="margin-left: 40px;"><i>Meriden E. Maranan - Vice-Chairperson</i></p> <p style="margin-left: 40px;"><i>Nancy R. Corpuz - Member</i></p> <p style="margin-left: 40px;"><i>Atty. Theresa M. Tenazas - Member</i></p> <p style="margin-left: 40px;"><i>Rowena F. Bolinas - End-user</i></p>
4.3(f)	<p><i>State specific details concerning the identification of the Project</i></p> <p style="text-align: center;"><i>REI # 2023-020</i></p>

4.3(e)	<p>The address for submission of eligibility documents is :</p> <p style="text-align: center;"><i>The Chairperson Bids and Awards Committee Biodiversity Management Bureau Ninoy Aquino Parks and Wildlife Center Quezon Avenue, Diliman, Quezon City Telephone No. 8924-6031 to 35 local 221 E-mail: hacsec@bmb.gov.ph</i></p> <p>The deadline for submission of eligibility documents is:</p> <p style="text-align: center;"><i>June 01, 2023, 1:00 P.M.</i></p>										
9.1	<p>Similar contracts shall refer to:</p> <p style="text-align: center;"><i>KAP Survey or Assessment</i></p>										
9.2	<p><i>Insert here the detailed set of criteria and rating system to be used by the Procuring Entity for the short listing of consultants. The criteria shall consider the applicable individual experiences of the principal and key staff in case of new firms.</i></p> <table border="1" data-bbox="493 1016 1279 1340" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;"><i>CRITERIA</i></th> <th style="text-align: center;"><i>WEIGHT</i></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><i>1. Track Record of Consulting Firm</i></td> <td style="text-align: center;"><i>55</i></td> </tr> <tr> <td style="text-align: center;"><i>2. Individual Qualification of Team Composition</i></td> <td style="text-align: center;"><i>45</i></td> </tr> <tr> <td style="text-align: center;"><i>TOTAL</i></td> <td style="text-align: center;"><i>100</i></td> </tr> <tr> <td style="text-align: center;"><i>PASSING RATE</i></td> <td style="text-align: center;"><i>70</i></td> </tr> </tbody> </table>	<i>CRITERIA</i>	<i>WEIGHT</i>	<i>1. Track Record of Consulting Firm</i>	<i>55</i>	<i>2. Individual Qualification of Team Composition</i>	<i>45</i>	<i>TOTAL</i>	<i>100</i>	<i>PASSING RATE</i>	<i>70</i>
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**PROCUREMENT OF A CONSULTING FIRM FOR THE DEVELOPMENT AND ENHANCEMENT  
OF NATIONAL AND CORRIDOR-LEVEL COMMUNICATIONS PLANS AND CORRIDOR  
BASELINE AWARENESS INSTRUMENTS FOR THE BIODIVERSITY CORRIDOR PROJECT**

**CHECKLIST OF REQUIRED DOCUMENTS**

**LEGAL DOCUMENTS**

Class "A" Documents

1. PHILGEPS Certificate of Registration (Platinum)

**TECHNICAL DOCUMENTS**

2. Statement of 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:
  - 2.1 the name and location of the contract;
  - 2.2 date of award of the contract;
  - 2.3 type and description of consulting services;
  - 2.4 consultant's role (whether main consultant, sub consultant, or partner in a JV)
  - 2.5 amount of contract
  - 2.6 contract duration; and
  - 2.7 certificate of satisfactory completion or equivalent document specified in the EDS issued by the client, in the case of a completed contracts
3. 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.

Class "B" Document

If applicable

4. Joint Venture Agreement (JVA) in case the joint venture is already existence, or duly notarized statements from all the potential joint venture partners in accordance with Section 24.1(b) of the IRR R.A. 9184



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**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 years/s for studies and day/s and hour/s for trainings /workshop s/seminars	

\_\_\_\_\_  
Name and Signature of Authorized Representative

\_\_\_\_\_  
Date

**Instructions:**

- a) Cut-off date : The day before the deadline of submission of eligibility documents.
- b) State completed contracts for the last five (5) 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.

**PROCUREMENT OF A CONSULTING FIRM FOR THE DEVELOPMENT AND ENHANCEMENT  
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**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 years/s for studies and day/s and hour/s for trainings / workshops/ seminars	

\_\_\_\_\_  
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.

## 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.]*

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### Education:

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

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### 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 20 years 9in-man-months for evaluation studies and man-hours/man-days for trainings/seminars/workshops conducted/provided), 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.]*

---

### Trainings Attended:

*[Summarize trainings/seminars attended as participant indicating topic and specific duration 9in hours/days). Attach certificates, if any. Failure to indicate details shall merit zero points.]*

### Languages:

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



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**Certification:**

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

\_\_\_\_\_ Date : \_\_\_\_\_  
*(Signature of staff member and authorized representative of the firm) Date/Month/Year*

Full name of staff member:

Full name of authorized representative:

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**STATEMENT OF KEY STAFF FOR CONSULTING SERVICES**

**Name of Consultant:** \_\_\_\_\_

**Business Address :** \_\_\_\_\_

Field of Expertise/Name of Personnel	Name of Related Study Involved	Position/Involvement in the Related Study	Nationality	Years with the Firm	Number of Study Currently Involved
1. Team Leader/KM-CEPA Specialist					
1					
to					
n					
2. Social Scientist/ Consumer Marketing Specialist					
1					
to					
n					
3. Statistician/Data Analyst					
1					
to					
n					

It is hereby confirmed that the above consultants are registered professionals authorized by the appropriate regulatory body to practice their profession.

Note:

- Should the personnel mentioned above are "on-call" or not a permanent employee of the consulting firm, please provide evidence and said personnel agreed to be nominated and once the firm is shortlisted, the personnel will submit letter of commitment.

Submitted by: \_\_\_\_\_

Name of Representative of Bidders: \_\_\_\_\_

Position: \_\_\_\_\_

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