

PHILIPPINE BIDDING DOCUMENTS

Consultancy Services for the Training Service Provider on Effective Leadership

Philippine Coconut Authority



[Small Value Procurement No. 03-2023-C]

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REPUBLIC OF THE PHILIPPINES
DEPARTMENT OF AGRICULTURE
PHILIPPINE COCONUT AUTHORITY
Elliptical Road, Diliman, Quezon City 1101 Philippines
Tel. Nos.: (02) 8928-4501 to 09 · Direct Line: (02) 8926-7631
Website: pca.gov.ph

REQUEST FOR EXPRESSION OF INTEREST

CONSULTANCY SERVICES FOR THE TRAINING SERVICE PROVIDER ON EFFECTIVE LEADERSHIP

1. The Philippine Coconut Authority (PCA) (herein after called “Procuring Entity”), through the 2023 FPE FE HRD fund intends to apply the sum of **Five Hundred Thousand pesos (Php500,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for Consultancy Services for the Training Service Provider on Effective Leadership. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The Procuring Entity now calls for the submission of eligibility documents to provide Consultancy Services for the Training Service Provider on Effective Leadership. The contract shall be completed within the timeline specified in the Terms of Reference (TOR).

Eligibility documents of interested consultants must be duly received by the BAC Secretariat through manual/physical submission on or before **October 18, 2023; 10:00AM**, at the following address:

*The BAC Secretariat Office
5th Floor, PCA R&D Building
Elliptical Road, Diliman, Quezon City*

3. Opening of received eligibility documents shall be conducted per schedule at AFB Conference Room, R&D Building, Elliptical Road, Diliman, Quezon City, and/or through video conferencing or webcasting via Zoom (link will be provided to interested bidders upon request on the email address and/or contact number below). Bids will be opened in the presence of the Bidders’ representatives who choose to attend the opening. **Late eligibility documents shall not be accepted.**
4. Interested consultants may obtain further information from PCA and inspect the Eligibility Documents at the address given above from Mondays to Fridays, 8:00AM to 4:00PM.

A complete set of Eligibility Documents including the Terms of Reference (TOR) for the consultancy services may be acquired by interested Bidders on Oct. 14-18, 2023 from the address above. 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 (<https://pca.gov.ph/>).

5. The BAC shall draw up the short list of consultants from those who have submitted an 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 shortlist shall consist of **five (5)** prospective consultants who will be entitled to submit bids. The criteria and rating system for shortlisting are:

Masaganang Agrikultura, Maunlad na Ekonomiya

Rating Factor	Weight (%)
1. Applicable experience of the consultant (meaning the consulting firm) and associates in case of joint ventures	50%
2. Qualification of principal and key staff of the consultant who may be assigned to the job vis-à-vis extent and complexity of the undertaking	30%
3. Current workload relative to capacity	20%

The prospective Consultant(s) must pass the required minimum score of seventy percent (70%) to be shortlisted.

Shortlisted Consultants may purchase the Bid Documents at a non-refundable fee of Five Hundred pesos (Php500.00) at the same address given above.

6. Procurement will be conducted through Small Value Procurement procedures using non-discretionary “pass/fail” criterion as specified in the IRR of RA 9184.

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

7. The Procuring Entity shall evaluate bids using the Quality-Cost Based Evaluation (QCBE) 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 timeline specified in the Terms of Reference (TOR).
9. The PCA 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 BAC Secretariat Office
5th Floor, PCA R&D Building
Elliptical Road, Diliman, Quezon City
928-4501 loc. 409
pcacobac@pca.gov.ph*

11. You may visit the following websites:

For downloading of Bidding Documents:

<https://www.philgeps.gov.ph/>
<https://pca.gov.ph/>

Issued on October 13, 2023.

Originally signed
ROEL M. ROSALES
CO BAC Chairman

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) Platinum 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.

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.

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 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.

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.

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.

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.

Eligibility Data Sheet

Eligibility Data Sheet

Eligibility Documents	
1.2	<p>The procuring entity is the Philippine Coconut Authority (PCA).</p> <p>The name of the contract is the Consultancy Services for the Training Service Provider on Effective Leadership.</p>
1.3	No further instructions.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts for at least 5 years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	The prospective bidder should be an accredited training provider by the Civil Service Commission;
0	Each prospective bidder shall submit one (1) original and two (2) copies of its eligibility documents.
(e)	<p><i>The envelope shall be addressed to:</i></p> <p>ROEL M. ROSALES CO BAC Chairman Philippine Coconut Authority 8/F Executive Lounge, PCA R&D Building, Diliman, Quezon City</p>
(f)	The name of the project is the Consultancy Services for the Training Service Provider on Effective Leadership.
0	<p>The address for submission of eligibility documents is:</p> <p>AFB Conference Room, 5F R&D Bldg. Diliman Quezon City</p>
0	<p>The place of opening of eligibility documents is:</p> <p>AFB Conference Room, 5F R&D Bldg. Diliman Quezon City</p> <p>PCA R&D Building, Diliman, Quezon City</p>
0	Similar contracts shall refer to Training Service Provider.
0	The criteria for shortlisting are as follows and the consultants should have a minimum score of 70% to be shortlisted:

	Rating Factor		Weight (%)
	1. Applicable experience of the consultant (meaning the consulting firm) and associates in case of joint ventures		50%
	2. Qualification of principal and key staff of the consultant who may be assigned to the job vis-à-vis extent and complexity of the undertaking		30%
	3. Current workload relative to capacity		20%

Terms of Reference

TERMS OF REFERENCE

Consultancy Services for the Training Service Provider on Effective Leadership

I. SCOPE OF WORK

1. To develop, submit for approval, and implement a training course on Effective Leadership, with the following qualifications:
 - a) Must be based on well-documented, recognized, and proven principles, concepts, and practices of leadership;
 - b) Must have a definable outcome that can be measured and observed;
 - c) Must incorporate multiple teaching techniques adapted to andragogical principles;
2. The training shall be run in three (3) batches of (3) days each equivalent to 24 hours CSC accredited training requirement.
3. Each run must accommodate at least 35 participants per batch.
4. One (1) week prior the training, submit proposed design for approval.
5. The training shall be conducted first week after the issuance of the Notice to Proceed.
6. The training shall be held on site at the Philippine Coconut Authority, Diliman, Quezon City

II. APPROVED BUDGET

The approved budget for the contract is Php500,000.00 inclusive of tax

III. MODE OF PAYMENT

Payment shall be made after completion of the (3) batches.

IV. OTHER TERMS AND CONDITIONS

- The prospective bidder shall provide the training certificates, manuals, training materials, handouts and travelling expenses of Speakers and staff to and from the venue, post training report and conduct of the program.
- The prospective bidder should be an accredited training provider by the Civil Service Commission.
- The Resource Persons/Speakers assigned must have documented expertise on the subject matter gained from leadership experience or formal study.
- The prospective training provider must possess the applicable experience in the industry for at least five (5) years.
- The prospective bidder should have conducted similar training to at least five (5) national government or Government owned and controlled corporation agencies with satisfactory rating.

Conforme:

Bidder's Representative

Date

Note: Each page of this Terms of Reference shall be initialed by the Bidder's authorized representative

Checklist of Eligibility Requirement

	ELIGIBILITY DOCUMENTS
	CLASS "A" DOCUMENTS
<input type="checkbox"/>	PhilGEPs Platinum Membership Certificate
<input type="checkbox"/>	Statement of the prospective bidder of all its ongoing and completed government and private contracts for <u>at least five (5) years</u> , 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 <u>EDS</u> .
Supported with the following:	
<input type="checkbox"/>	(a) name of the contract
<input type="checkbox"/>	(b) date of the contract
<input type="checkbox"/>	(c) type and brief description of consulting services
<input type="checkbox"/>	(d) consultant's role (whether main consultant, subconsultant, or partner in a JV)
<input type="checkbox"/>	(e) amount of contract
<input type="checkbox"/>	(f) contract duration
<input type="checkbox"/>	(g) certificate of satisfactory completion or equivalent document specified in the <u>EDS</u> issued by the client, in the case of a completed contract
<input type="checkbox"/>	Valid certificate of accreditation as training provider issued by Civil Service Commission;
<input type="checkbox"/>	List of prospective bidder's similar training (leadership training) conducted to at least five (5) national government or Government owned and controlled corporation agencies with satisfactory rating (provide supporting attachments e.g. MOA, Contract, Purchase Order, etc.)
<input type="checkbox"/>	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" DOCUMENTS (For Joint Ventures)	
<input type="checkbox"/>	If applicable, Joint Venture Agreement (JVA) in accordance with RA 4566.

Bidding Forms

STATEMENT OF COMPLETED CONTRACT SIMILAR TO THE CONTRACT TO BE BID

This is to certify that _____ (company, address) _____ has the following completed contracts for the period CY (within five (5) years from the date of submission and receipt of bids, a contract similar to the Project)						
Date of the Contract	Contracting Party	Name of Contract	Kinds of Services	Amount of Contract (adjusted to current prices, if necessary)	Date of Delivery/ End-user's Acceptance	Date of Official Receipt
_____ Name and Signature of Authorized Representative				_____ Date		

***Instructions:**

- a) Cut-off date: the day **before the deadline of** submission of bids.
- b) In the column under "Dates", indicate the dates of Delivery/End-user's Acceptance and Official Receipt. (Attach certified copies)
- c) **"Name of Contract"**. Indicate the Nature/Scope of the Contract to determine the relevance of the entry with the Procurement at hand. *Example: "Supply and Delivery of Generator Set"*

STATEMENT OF: (i) ONGOING CONTRACTS AND; (ii) AWARDED BUT NOT YET STARTED CONTRACTS

This is to certify that _____ (company, address) _____ has the following ongoing and awarded but not yet started contracts:						
Date of the Contract	Contracting Party	Name of Contract	Kinds of Services	Amount of Contract	Value of Outstanding Contracts	Bidder is A) Manu- fac- turer B) Sup- plier C) Distri- butor D) Con- sultant
_____ Name and Signature of Authorized Representative				_____ Date		

***Instructions:**

- a) State here all government and private contracts which may be **similar or not similar** to the project called for bidding as of: **The day before the deadline of** submission of bids.
- b) The total amount of the ongoing and awarded but not yet started contracts should be consistent with those used in the Net Financial Contracting Capacity (NFCC) in case an NFCC is submitted as an eligibility document.
- c) **"Name of Contract"**. Indicate here the Nature/Scope of the Contract for easier tracking of the entries/representations. *Example: "Supply and Delivery of Generator Set"*

Format of Curriculum Vitae (CV) for Proposed Professional Staff

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. Describe degree of responsibility held by staff member on relevant previous projects and give dates and locations. Use about half a page.]

Education:

[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]

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 ten years, also give types of activities performed and client references, where appropriate. Use about two pages.]

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.

Commitment:

I also commit to work for the Project in accordance with the time schedule as indicated in the contract once the firm is awarded the Project.

[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 ____.

