



INVITATION FOR NEGOTIATED PROCUREMENT (TWO-FAILED BIDDINGS)

CONSULTANCY SERVICES FOR INVESTORS IN PEOPLE (Request for Proposal [RFP] No. 2022-TFB-55)

1. The Securities and Exchange Commission (SEC), through the authorized appropriations under the **FY 2022 Budget** of SEC, intends to apply the sum of **Six Million Three Hundred Thousand Pesos (Php6,300,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for the **"Consultancy Services for Investors in People (No. 2022-TFB-55)"**. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. With the approval of BAC Resolution No. 2022-069 declaring a second failure of bidding and the resolution to resort to Negotiated Procurement – Two Failed Biddings in accordance with Section 53.1 of the 2016 Revised Implementing Rules and Regulations (IRR) of RA 9184, SEC now calls for the submission of eligibility, technical and financial proposals for the abovementioned Project, which main objective is to provide technical assistance to SEC on defining the current organizational capacities and competencies as well as facilitate interventions to bridge the gap between the current performance and the envisioned goals of strategic HRM by 2025.

Detailed schedule of requirements is indicated in the Terms of Reference (TOR) of the Project.

3. Initial Meeting will be conducted on August 5, 2022 at 10:00 A.M. via videoconferencing (Zoom Application). Prospective bidders are invited to attend the initial meeting and may wish to secure the Zoom meeting credentials by sending a Letter of Intent to bacsecretariat@sec.gov.ph and/or fpbaluyot@sec.gov.ph on or before August 4, 2022.
4. Prospective Bidders must submit their Bidding Documents (Eligibility Documents, Technical and Financial Proposals in three [3] separate sealed envelopes) not later than 10:00 A.M. on August 19, 2022 at the Procurement Division, 7/F SEC Headquarters, Makati Ave., Salcedo Village, Brgy. Bel-Air, Makati City (former UCPB Building).
5. The Notice of Procurement, Terms of Reference (TOR), and the Eligibility, Technical and Financial Bid Forms and Templates are now available at SEC and PhilGEPS websites until the deadline for the submission of bids.
6. The criteria and rating system for Technical Evaluation are:

Applicable Experience	-	30 pts.
Qualification of Personnel	-	30 pts.
Proposed Methodology	-	40 pts.

SEC shall evaluate bids using the Quality-Cost Based Evaluation (QCBE).

7. Bidding will be conducted through Alternative Mode of Procurement – Negotiated Procurement under Two-Failed Biddings procedure using non-discretionary “pass/fail” criterion as specified in the 2016 Revised IRR of RA 9184 on Eligibility and Preliminary Examination of Bids.

Bidding is restricted to Filipino citizens/sole proprietorships, partnerships, or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to the citizens of the Philippines, and to citizens or organizations of a country the laws or regulations of which grant similar rights or privileges to Filipino citizens, pursuant to RA 5183.

8. SEC reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to awarding of the contract in accordance with Sections 35.6 and 41 of RA No. 9184 and its 2016 Revised IRR, without thereby incurring any liability to the affected bidder or bidders.

Moreover, in accordance with Section 24.7 of the 2016 Revised IRR of RA No. 9184, notwithstanding the eligibility of a consultant and/or inclusion in the shortlist of consultants, SEC reserves the right to review the consultant’s qualifications at any stage of the procurement process if it has reasonable grounds to believe that a misrepresentation has been made, or that there has been a change in the consultant’s capability to undertake the project from the time of submission of the eligibility requirements.

9. For further information, please refer to: SEC BAC Secretariat
Procurement Division
Human Resource and Administrative Department
Securities and Exchange Commission
7/F SEC Headquarters, 7907 Makati Ave., Salcedo Village, Brgy. Bel-Air, Makati City
Telephone No.: 8818-5330
Email address: bacsecretariat@sec.gov.ph

10. You may visit the following website to download the Bidding Documents:
<https://www.sec.gov.ph>
<https://www.philgeps.gov.ph>

July __, 2022


ARMANDO A. PAN JR.
Chairman, SEC-BAC

TERMS OF REFERENCE

Consultancy Services for Investors in People (IIP)

1 Background

The Securities and Exchange Commission (SEC) has an expansive mandate over the corporate sector, the capital market, and the investing public. The vision of the SEC is to be the best corporate market regulator in Southeast Asia anchored the overall SEC Vision 2025. For the Human Resource and Administrative Department (HRAD), two (2) of the strategic objectives envisioned are (1) to attract the best and retain the best and the brightest professionals and (2) to develop and maintain a culture of excellence. These objectives fall under the umbrella of the Project Quest Strategic Initiative, which aims to institutionalize excellence in the agency's organizational performance and human resource management. To achieve this, the SEC seeks technical assistance on embedding high standards of leadership and management, encompassing effective and efficient processes and leadership practices and getting Investors in People (IIP) accreditation in the next few years. The table below identifies the targets over the seven (7) year duration, viz:

Year	IIP Certification
2022	Hiring of consultants to conduct assessment and prepare the agency for IIP Certification
2023	Standard Certification
2024	Compliance with Silver Certification
2025	Silver Certification

This project will constitute a series of leadership and management interventions, and business processes interventions incorporating organizational development, principles of effective execution and design thinking, service design, and innovation management system strategies.

2 Objectives

The Consultancy Services for Investors in People (IIP) aims to ensure that:

- 2.1 The agency's leadership and management practices meet international standards;
- 2.2 The employees' credibility, integrity, commitment, competence, and motivation are enhanced;
- 2.3 The agency has an effective quality system, incorporating Investors in People, and an ISO system focused on process improvement, incorporating ISO 9004:2018 guidelines to ensure effective implementation;
- 2.4 The agency's internal and external stakeholders are involved in identifying opportunities for improvement and in the creation of solutions and improvement plans that are conformable to (or consistent with) ISO standards on innovation;

- 2.5 The agency builds capability in Investors in People (IIP) standards of leadership, management and engagement, managing change, business process improvement, execution agility and design thinking and service design methodologies and related technologies; and
- 2.6 The agency institutionalizes leadership and management practices that will be sufficiently effective to meet the requirements of the international Investors in People (IIP) accreditation.

3 Duration

The services of the Consultancy Firm, hereon referred to as the Consultant, shall be engaged for a period of twelve (12) months from the date of the issuance of Notice to Proceed and renewable upon the recommendation of the end user and approval of the Commission en banc.

The twelve-month period shall exclude the period in which a deliverable submitted by the Consultant is placed under consideration for review and/or approval of the Commission en banc.

4 End-user

The project is under the supervision of the Human Resource and Administrative Department (HRAD), through the Learning Resource and Information Division (LRID).

5 Approved Budget for the Contract

The maximum possible contract price for the services for the first twelve-month period is **SIX MILLION THREE HUNDRED THOUSAND PESOS (P6,300,000.00)**. A bid in excess of this amount shall automatically be rejected at the opening of the financial proposal.

This amount shall be inclusive of twelve percent (12%) Value Added Tax (VAT) and other taxes imposed by the government. The amount shall be billed by the Consultant upon the submission of each deliverable according to the schedule specified under Item 7. Deliverables and Payment Schedule of the TOR.

Expenses and tools of the trade and other similar items necessary to enable Consultant to carry out its commitments in accordance with this Terms of Reference shall be for the account of the Consultant.

6 Scope of Services and Deliverables

The Consultant will conduct the assessment and interventions that includes the following:

- 6.1 The Consultant shall design and provide professional services on leadership and management practices aligned with the SEC's strategic vision taking into account the:

- Agency's Organizational Culture;
This should include a review of the failures of previous organizational reforms, organization values and norms that have been developed over time, and ways of thinking and behaving;
 - Agency's organizational capacitation thrust as identified during the 2022 Strategic Planning;
 - The link between agency's process improvement, execution agility, and service innovation and its digital transformation roadmap as well as to the Quality Management System (ISO 9001:2015), the Ease of Doing Business and Efficient Government Service Delivery Act of 2018 (RA 11032), and its Business Continuity Plan (BCP), Strategic, Planning, and Transition Plan;
 - Emerging learning in human capital reporting, ISO 30414, and related concerns;
 - Inclusion of the Head Office as well as its Extension Offices located in Bacolod City, Baguio City, Cagayan de Oro City, Cebu City, Davao City, Iloilo City, Legazpi City, Tarlac City and Zamboanga City in the coverage of the consultancy;
 - Internal and external stakeholders' roles and needs; and
 - Schedule and activities of the agency, top management, Technical Working Group (TWG) members and other consultants.
- 6.2 The Consultant shall design a program with corresponding strategies for the rollout and upgrading of business processes (with accompanying execution modalities) that will ensure continuous progress in the creation of solutions and improvement plans;
- 6.3 The Consultant shall prepare, capacitate and implement a succession plan to ensure the TWG members will be ready to take over fully at the end of the engagement;
- 6.4 The Consultant shall implement the following activities throughout the contract:

Component 1 – Program Mobilization

Deliverable 1: Mobilization Report

The Consultant will prepare and deliver to SEC a Mobilization Report, which shall contain the results of the initial review of the agency's institutional profile, leadership and management practices, people engagement and gap analysis. It shall also contain the project objectives, scope, activities, outputs and timeline.

Other activities shall include:

- Enrolment to the IIP Community

Deliverable 2: Inception Report

The Consultant will prepare and deliver to SEC an Inception Report, which shall include the detailed work plan of activities, results of the program launch and the discussions of the initial strategic planning session. It shall also include the membership to Investors in People Community.

Component 2 – Organizational Assessment

Deliverable 3: Organizational Assessment Report

The Consultant will prepare and deliver to SEC an Organizational Assessment Report, which shall include initial assessment of the effectiveness of leadership and management practices and people management and initial gap analysis of the agency's existing management system. It shall also include initial assessment of processes in meeting the agency's mandate and stakeholder expectations.

The report shall include initial assessment of the alignment of business processes with ISO 9004:2018 guidelines to ensure sustained success of improved processes based on the seven (7) quality management principles and KPI review.

The report shall further provide the agency with comprehensive information relating to the current position in leadership and management, internal business processes, customer services and recommendations for improvement.

Other activities shall include:

- Consultation meetings, interviews, and focus group discussions with relevant stakeholders;
- Conduct of IIP Baseline Survey of the whole organization;
- Validation of results through focus group discussions and interviews with the top management;
- Relevant stakeholders research through on-site observational study, interviews and surveys;
- Workshop for relevant stakeholders during organizational assessment; and
- Report and presentation of organizational assessment results.

Deliverable 7: Monthly Progress Reports

The Consultant will prepare and deliver to SEC a Monthly Progress Report at the end of every month, which shall include the status, actions and updates of deliverables and meetings.

Component 3 – Capacity Building and Design

Deliverable 4: Organizational Design Plan

The Consultant will prepare and deliver to SEC an Organizational Design Plan, which shall include documentation and results of the capacity building workshops in improving leadership, customer service and business processes. It shall also include internally generated solutions and action plans based on the outcome of the organizational assessment that will address identified issues and gaps. It shall

also include a business process map, risk management plan, register of KPIs and corrective action plans.

The design plan shall incorporate recommendations on setting up an innovation management system (pursuant to relevant ISO standards on innovation) meant to deliver excellent and sustainable public value.

The report shall likewise include the results of benchmarking with other government agencies with experience in introducing similar quality and innovation management systems.

Other activities shall include:

- Consultation meetings, interviews, and focus group discussions;
- Conduct of change management/leadership workshops for leaders;
- Capacitation of relevant stakeholders in the IIP Standard and application of all learning in business processes improvement, sustainable innovation, and effective execution; and
- Report and presentation of key learning points from the workshops.

Deliverable 7: Monthly Progress Reports

The Consultant will prepare and deliver to SEC a Monthly Progress Reports at the end of every month, which shall include the status, actions and updates of deliverables and meetings.

Component 4 – Investors in People (IIP) Assessment

Deliverable 5: Investors in People (IIP) Assessment Report

The Consultant will prepare and deliver to SEC an Investors in People (IIP) Assessment Report, which shall include the results of the benchmarking with other IIP organizations globally, context setting with leaders, and site or virtual visit for observations and interviews with selected stakeholders. The report shall also include the status of compliance with the IIP Standard and granular recommendations for continuous improvement.

Other activities shall include:

- Consultation meetings, interviews, and focus group discussions; and
- Report and presentation of the IIP Assessment.

Deliverable 7: Monthly Progress Reports

The Consultant will prepare and deliver to SEC a Monthly Progress Report at the end of every month, which shall include the status, actions and updates of deliverables and meetings.

Component 5 – Businesses Processes Final Assessment

Deliverable 6: Business Processes Improvement Report

The Consultant will prepare and deliver to SEC a Business Processes Improvement Report, which shall include the final business processes audit outcomes and recommendations. The report shall likewise include internally generated solutions and action plans addressing the issues and gaps determined through the organizational assessment and application of learning from the workshops in IIP, design thinking, and innovation technologies, business improvement, and effective execution.

Other activities shall include:

- Consultation meetings, interviews, and focus group discussions;
- Capacitation of relevant stakeholders in improving leadership, design thinking, service design and business process improvement;
- Report and presentation of key learning points from the workshops; and
- Report and presentation of the solution and plans to the Commission en banc for approval.

Deliverable 7: Monthly Progress Reports

The Consultant will prepare and deliver to SEC a Monthly Progress Report at the end of every month, which shall include the status, actions and updates of deliverables and meetings.

Component 6 – Program Closing

Deliverable 8: Terminal Report and Succession Paper

The Consultant will prepare and deliver to SEC a Terminal Report the end of the contract, which shall include integrated report and executive summary of the project, recommendations, and consolidated final report, which outlines a succinct transformation roadmap, consisting of the following: 1) insights into the effectiveness of leadership and management practices as measured against the IIP Standard; 2) impact assessment of improved business processes, design thinking, and innovation projects; and 3) areas for further improvement (e.g. execution agility).

Other activities shall include:

- Presentation of the outcomes and recommendations for improvement; and
- Submission of a Succession Paper that will ensure the sustainability of the project at least six (6) months before the end of the contract.

7 Deliverables and Payment Schedule

The milestone deliverables shall be reviewed and accepted for the SEC by the Supervising Commissioner of the HRAD, upon the recommendation of the Director/Officer-in-Charge of the HRAD and the Assistant Director of LRID within two (2) weeks from the submission of deliverables and requirements.

The timelines, activities, and deliverables will need to be responsive to the evolving new normal in the wake of the COVID-19 pandemic and to the nature of the health and safety guidelines issued by the Inter-Agency Task Force on Emerging Infectious Diseases.

No.	Deliverable	Description	Due Date	Approximate % of Contract Price
1	Mobilization Report	As described in Item 6.4 in Scope of Services and Deliverables	Commencement Date	10%
2	Inception Report	As described in Item 6.4 in Scope of Services and Deliverables	30 Days after Commencement Date	5%
3	Organizational Assessment Report	As described in Item 6.4 in Scope of Services and Deliverables	90 Days after Inception Report	5%
4	Organizational Design Plan	As described in Item 6.4 in Scope of Services and Deliverables	90 Days after Organizational Assessment Report	5%
5	Investors in People (IIP) Assessment Report	As described in Item 6.4 in Scope of Services and Deliverables	90 Days after Organizational Design Report	5%
6	Business Processes Improvement Report	As described in Item 6.4 in Scope of Services and Deliverables	60 Days after IIP Assessment Report	5%
7	Monthly Progress Reports	Progress reports on the status of the deliverables	End of every month	5% per month
8	Terminal Report	Summary report of all activities should include a compendium of all final deliverables	End of the Contract	5%
	Succession Paper	Paper on how to ensure HRD Plan Sustainability	6 months before end of the assignment	

8 Qualification of the Consultancy Firm

The Consultant must have the varied expertise necessary to deliver the Technical Assistance on Organizational Capacity Building for SEC. The team must have an HR and

OD specialist/s and relevant experts on business process improvement, change management, and business planning.

- The Consultant
 - Must have at least 10 years' experience in strategic HR management, IIP consulting and assessing;
 - Must have at least 10 years' experience in business improvement and
 - Must have at least 5 years' experience in design thinking, service design and related technologies.
- The Team Leader
 - Must have relevant educational background on social, science, public administration human resource development studies, communications and/or marketing discipline *and* have trained or participated in any qualitative or quantitative design and methods training related to strategic HR management, IIP, business processes and design thinking, or project management, as shown by the submitted diploma(s), certificate (s) and other documents; and
 - Must have handled at least one similar or related project as shown by the certificate or documents.

9 Criteria for Shortlisting Eligible Bidders

To qualify for shortlisting, the prospective bidder should achieve an overall minimum score of 70 points.

No.	Evaluation Criteria	Minimum Score
1	Applicable experience of the Firm	50
	With proven track record in conducting organizational assessment with clients from private and government sectors <ul style="list-style-type: none"> ● More than 15 years (<i>50 points</i>) ● More than 10 years to 15 years (<i>40 points</i>) ● More than 7 years to 10 years (<i>30 points</i>) ● 5 years to 7 years (<i>20 points</i>) 	
2	Qualification of principal and key staff of the Firm who may be assigned to the job vis-a-vis extent and complexity of the undertaking	30
	2.1 Team Leader (<i>Total: 20 points</i>)	
	2.1.1 Professional Experience (<i>Max: 8 points</i>) <ul style="list-style-type: none"> ● More than 15 years of conducting organizational assessment as a team leader (<i>8 points</i>) ● 10 to 15 years of conducting organizational assessment as a 	

	<ul style="list-style-type: none"> team leader (6 points) Less than 10 years of conducting organizational assessment as a team leader (4 points) 	
	2.1.2 Education Qualification (Max: 5 points) <ul style="list-style-type: none"> Post-graduate degree (5 points) Master's degree (3 points) 	
	2.1.3 Prior engagements in conducting organizational assessment (Max: 7 points) <ul style="list-style-type: none"> 6 to 10 active and completed relevant projects (7 points) 1 to 5 active and completed relevant projects (4 points) 	
	2.2 Team Members (Total: 10 points)	
	2.2.1 Professional Experience (Max: 3 points) <ul style="list-style-type: none"> More than 10 years of conducting organizational assessment (3 points) 5 to 10 years of conducting organizational assessment (2 points) Less than 5 years of conducting organizational assessment (1 points) 	
	2.2.2 Trainings Attended Relevant to Organizational Assessment and IIP ¹ (Max: 2 points) <ul style="list-style-type: none"> More than 80 hours of relevant training (2 points) 40 to 80 hours of relevant training (1 point) Less than 40 hours of relevant training (0 point) 	
	2.2.3 Educational Qualification (Max: 2 points) <ul style="list-style-type: none"> Post-Graduate Degree (2 points) Master's Degree (1 point) Bachelor's Degree (0 point) 	
	2.2.4 Prior engagements in conducting organizational assessment (Max: 3 points) <ul style="list-style-type: none"> 3 to 4 active and completed relevant projects (3 points) 1 to 2 active and completed relevant projects (1 point) 	
3	Current Workload	20
	3.1 Positive Feedback (Max: 5 points) <ul style="list-style-type: none"> Work Acceptance Report/Certification by previous client or any equivalent document (5 points) 	
	3.2 Overall Work Commitment ² (Max: 15 points) <ul style="list-style-type: none"> Higher than 1.5 ratio (number of consultants divide 	

¹ For bids with more than four team members, the scores will be averaged

² Consulting Firm with no ongoing projects will automatically get the maximum points

	ongoing projects) (15 points) • Between 1.0 and 1.5 ratio (number of consultants divide ongoing projects) (10 points) • Between 0.5 and 1.0 ratio (number of consultants divide ongoing projects) (7 points) • Lower than 0.5 ratio (number of consultants divide ongoing projects) (5 points)	
--	---	--

10 Criteria for Evaluation of Shortlisted Bidders

The Highest Rated Bidder is the bidder with the highest rated score based on the technical and financial bids submitted if the score passes the rate of 80%.

The technical and financial proposals of the shortlisted bidders will be evaluated through Quality-Cost-Based Evaluation (QCBE), based on the following criteria:

No.	Evaluation Criteria	Minimum Score
TECHNICAL PROPOSAL (85%)		
I	Qualification of key personnel	30
	A. Education (Total: 5 points) a. Team Leader (Max: 3 points) <ul style="list-style-type: none"> • Post-graduate degree (PhD) (3 points) • Master's degree (2 point) b. Team Members (Max: 2 points) <ul style="list-style-type: none"> • Master's degree (2 points) • Bachelor's degree (1 point) B. Work Experience (Total: 15 points) a. Team Leader (Max: 10 points) <ul style="list-style-type: none"> • More than 15 years of conducting organizational assessment as a team leader (10 points) • 10 to 15 years of conducting organizational assessment as a team leader (8 points) • Less than 10 years of conducting organizational assessment as a team leader (5 points) 	

	<p>b. Team Members (Max: 5 points)</p> <ul style="list-style-type: none"> • More than 10 years of conducting organizational assessment as a team leader (5 points) • 5 to 10 years of conducting organizational assessment as a team leader (3 points) • Less than 5 years of conducting organizational assessment as a team leader (1 point) <p>C. Trainings Attended/Conducted Relevant to Organizational Assessment and PRIME-HRM (Total: 10 points)</p> <p>a. Team Leader (Max: 6 points)</p> <ul style="list-style-type: none"> • More than 80 hours of relevant training (6 points) • 40 to 80 hours of relevant training (4 points) • Less than 40 hours of relevant training (1 point) <p>b. Team Members (Total: 4 points)</p> <ul style="list-style-type: none"> • More than 80 hours of relevant training (4 points) • 40 to 80 hours of relevant training (3 points) • Less than 40 hours of relevant training (1 point) 	
II	Applicable experience of the Firm	30
	<p>A. With proven track record in conducting organizational assessment and in assessing and assisting in the processes of HRM Systems, Practices, and Competencies using HRM maturity level indicators (Total: 15 points)</p> <ul style="list-style-type: none"> • More than 15 years (15 points) • More than 10 years to 15 years (10 points) • More than 7 years to 10 years (6 points) • 5 years to 7 years (3 points) <p>B. Prior engagements in conducting organizational assessment and in assessing and assisting in the</p>	

	<p>processes of HRM Systems, Practices, and Competencies using HRM maturity level indicators (Total: 15 points)</p> <ul style="list-style-type: none"> ● 3 to 4 active and completed projects (15 points) ● 1 to 2 active and completed projects (10 points) 	
III	<p>Plan of approach or methodology with emphasis on the clarity, feasibility, innovativeness and comprehensiveness of the support services that will be provided by the Consultant as listed in the Terms of Reference</p>	40
	<p>A. Clear and well-structured action plan with definite timeline, detailed workplan and appropriate results indicator (Total: 20 points)</p> <ul style="list-style-type: none"> ● All portions of the action plan are clear and well-structured with definite timeline, detailed workplan and appropriate results indicator (11 to 20 points) ● Some portions of the action plan are clear and well-structured with definite timeline and/or detailed work plan and/or appropriate results indicator (6 to 10 points) ● All portions of the action plan are not clear and well-structured with no definite timeline, no detailed workplan, and no appropriate results indicator (1 to 5 points) <p>B. Feasibility (Realistic/implementable/measurable/practicable) (Total: 10 points)</p> <ul style="list-style-type: none"> ● All portions are realistic/implementable/measurable/practicable (8 to 10 points) ● Some portions are realistic/implementable/measurable/practicable (4 to 6 points) ● All portions are not realistic/implementable/measurable/practicable (1 to 3 points) <p>C. Innovativeness and comprehensiveness of the plan of approach (responsiveness to the engagement)</p>	

	<p><i>(Total: 10 points)</i></p> <ul style="list-style-type: none"> ● All portions of the plan of approach are responsive to the engagement <i>(8 to 10 points)</i> ● Some portions of the plan of approach are responsive to the engagement <i>(4 to 7 points)</i> ● All portions of the plan of approach are not responsive to the engagement <i>(1 to 3 points)</i> 	
FINANCIAL PROPOSAL (15%)		

11 Responsibilities of the Parties

The Consultant shall assume the following obligations:

1. Ensure that all proposed activities are consistent with the overall project framework provided by the SEC;
2. Establish linkages and close coordination with other Consultant/s for other deliverables under Project QUEST to achieve strategic complementation in terms of activities and deliverables (e.g. use of common project management methodology);
3. Designate the project lead to ensure timely delivery of outputs and the to coordinate with SEC in carrying out the services;
4. Assists in organizing a team that would help the Consultant gather the data that will be needed for the project development and implementation of the required deliverables based on this TOR;
5. Develop the design and methodologies that will best fit the organizational needs in terms of the required expected outputs and deliverables;
6. Seek the approval of the Director/OIC of the HRAD on any changes; amendments, modifications and adjustments in the implementation of proposed project development methods prior to their conduct;
7. Submit all the mandatory accomplishment and status reports based on the agreed timeline under Item 7. Deliverables and Payment Schedule of this TOR;
8. Maintain the confidentiality of the data and information acquired and all other related activities generated thereof, until such is determined and declassified by the SEC;
9. Shoulder the airfare or transportation expenses including incidental expenses like accommodation in activities to be conducted in the region not covered by the SEC budget;
10. Arrange and shoulder the venue for organizational assessment covered by the Project.

The SEC shall assume the following obligations:

1. Provide general supervision and direction on the conduct of the project development;
2. Coordinate in organizing the team that will provide the necessary data and information both qualitative and quantitative to the Consultant;
3. Review and approve all changes in the execution of the proposed Project implementation prior to the conduct of the activities;
4. Review and approve all project deliverables, and related activities based on the timetable and in accordance with this TOR;
5. Shoulder all transportation expenses, accommodation and other incidental expenses for SEC employees to facilitate the conduct of the activities in the regions;
6. Shoulder all expenses not covered by the Project; and
7. Create a TWG, as needed, to ensure completion of the Project. The members of the TWG will be identified and vetted by the Assistant Director of the LRID and affirmed by the Director/OIC of the HRAD.

12 Reporting and Working Arrangements

The Consultant shall report to the HRAD Director/OIC and to the HRAD-LRID Assistant Director.

The Consultant shall coordinate and work closely with the TWG Members and other relevant stakeholders.

The Consultant shall coordinate and work closely with the other consultants working on the projects under the Project QUEST strategic initiative.

The SEC shall provide the Consultant with a work area with internet access during office hours for the duration of the project (if allowed in the latest guidelines issued by the Inter-Agency Task Force on Emerging Infectious Diseases).

Other resources such as office equipment, supplies and other logistical requirements to complete or deliver the scope of services shall be provided by the consultant.

13 Other Items

13.1 Disclaimer

There will be no employer-employee relationship between the SEC and the Consultant, nor between the former and the agents of the latter.

13.2 Property of SEC

Any and all work (including meeting and workshop recordings) resulting from the engagement as originating from this TOR and any of its subsequent documents shall

be the sole and exclusive property of the SEC, which shall be turned over whenever required by the agency.

13.3 Confidentiality

Subject to exceptions as may be provided under the existing laws, the Consultant guarantees that the TOR and all information, data and documents that may be directly or indirectly acquired or received by the Consultant or any person under their instructions or authority in the course of the TOR including experts, consultants or trainers, shall not be used or disclosed to any unauthorized third party for any purpose other than contemplated under this TOR and that all persons acting under the TOR shall avoid and be free from conflict of interest.

13.4 Warranty

The Consultant warrants that its personnel are properly supervised, and legally and technically competent to provide and conduct the required scope of work as originating from this TOR. The SEC may demand for replacement of the Consultant's personnel if the performance and/or knowledge level is found below the expectation for the required services.

Prepared by:



Marjorie C. Dacillo
SEC Training Officer III
Learning Resource and Information Division
Human Resource & Administrative Department

Reviewed by:



Nohvienné C. Ermitaño, MNSA
SEC Assistant Director
Learning Resource & Information Division
Human Resource & Administrative Department

Approved by:



Atty. Eibert Catalino F. Flores III
SEC Director III
Human Resource & Administrative Department

CHECKLIST OF REQUIREMENTS FOR CONSULTING SERVICES

A. Eligibility Documents

I. Class "A" Documents –

Legal Documents

- ☐ (a) Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages);
Or
- ☐ (b) Registration certificate from Securities and Exchange Commission (SEC), Department of Trade and Industry (DTI) for sole proprietorship, or Cooperative Development Authority (CDA) for cooperatives or its equivalent document, **and**
- ☐ (c) Mayor's or Business permit issued by the city or municipality where the principal place of business of the prospective bidder is located, or the equivalent document for Exclusive Economic Zones or Areas; **and**
- ☐ (d) Tax clearance per E.O. No. 398, s. 2005, as finally reviewed and approved by the Bureau of Internal Revenue (BIR)

Technical Documents

- ☐ (e) Eligibility Documents Submission Form accompanied by a duly notarized company's Secretary's Certificate or Special Power of Attorney, as applicable (Use Annex A) ; **and**
- ☐ (f) Statement of all Government and Private Contracts Completed which are Similar in Nature (Use Annex B), together with Certificate/s of Good Standing and Satisfactory Completion or equivalent document/s; **and**
- ☐ (g) List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started (Use Annex C); **and**
- ☐ (h) Statement of the Consultant's Nationality (Use Annex D) with the attached Curriculum Vitae for the Proposed Professional Staff (Use Annex E)

Financial Documents

- ☐ (i) The Consultant's audited financial statements (AFS), showing among others, the Consultant's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission

II. Class "B" Document –

Legal Documents

- ☐ (j) Valid Joint Venture Agreement (JVA) if JV is in existence or duly notarized statements from all the potential joint venture partners stating that

they will enter into and abide by the provisions of the JVA in the event that the bid is successful.

B. Technical Proposal

- ☐ TPF 1 – Technical Proposal Submission Form (Use Annex F)
- ☐ TPF 2 – Consultant's References (Use Annex G)
- ☐ TPF 3 – Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be Provided by the Procuring Entity (Use Annex H)
- ☐ TPF 4 – Description of the Methodology and Work Plan for Performing the Project (Use Annex I)
- ☐ TPF 5 – Team Composition and Task (Use Annex J)
- ☐ TPF 6 – Notarized Curriculum Vitae for Proposed Professional Staff (Use Annex E)
- ☐ TPF 7 – Time Schedule for Professional Personnel (Use Annex K)
- ☐ TPF 8 – Activity (Work) Schedule (Use Annex L)
- ☐ TPF 9 – Omnibus Sworn Statement (Use Annex M)
- ☐ Bid Security (Use Annex N)

C. Financial Proposal

- ☐ FPF 1 – Financial Proposal Submission Form (Use Annex O)
- ☐ FPF 2 – Summary of Costs (Use Annex P)
- ☐ FPF 3 – Breakdown of Costs (Use Annex Q)
- ☐ FPF 4 – Breakdown of Price per Activity (Use Annex R)
- ☐ FPF 5 – Reimbursables per Activity (Use Annex S)
- ☐ FPF 6 – Miscellaneous Expenses (Use Annex T)

ELIGIBILITY DOCUMENTS SUBMISSION FORM

[Date]

Securities and Exchange Commission
Bids and Awards
Committee
SEC Headquarters, 7907 Makati Ave.
Salcedo Village, Brgy. Bel-Air, Makati
City

Ladies/Gentlemen:

In connection with your Invitation for Negotiated Procurement dated *[insert date]* for **Consultancy Services for Investors in People (RFP No. 2022-TFB-55)**, *[Name of Consultant]* hereby expresses interest in participating in the eligibility and short listing for said Project and submits the attached eligibility documents in compliance with the Eligibility Documents therefor.

In line with this submission, we certify that:

- a) *[Name of Consultant]* is not blacklisted or barred from bidding by the GOP or any of its agencies, offices, corporations, or LGUs, including foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, and that each of the documents submitted; and
- b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.

We acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our submission irrespective of whether we are declared eligible and shortlisted or not.

Yours

sincerely,

Signature
Name and Title of Authorized Signatory
Name of Consultant
Address

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

Business Name: _____

Business Address: _____

Name and Location of Project Name of Client/ Contact Person/Contact Number/Email Address	Date of Award of the Contract	Type and Brief Description of Consulting Services	Amount of Contract	Project Duration (Start Date – Completion Date)	Consultant's Role (Main Consultant/ Subconsultant/ Partner in a JV)
<u>Government</u>					
<u>Private</u>					

Submitted by : _____
(Printed Name and Signature)

Designation : _____

Date : _____

Instructions:

- The contracts should have been completed (i.e., accepted) within the **five-year period from opening of bids**
- Similar contracts shall refer to the consultancy services for Investors in People (IIP) certification or any of its component/s or any synonymous project/s as described in the Terms of Reference

Note: Date of Acceptance shall mean the date when the items delivered have **satisfactorily met** the requirements of the procuring entity, as evidenced by Certificate of Good Standing and Satisfactory Completion or equivalent document (e.g., Certificate of Final Acceptance/Completion from the bidder's client, or an Official Receipt or a Sales Invoice) which must be included in the bid submission.

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

Business Name: _____ Business
Address: _____

Name and Location of Project Name of Client/ Contact Person/Contact Number/Email Address	Date of Award of the Contract	Type and Brief Description of Consulting Services	Amount of Contract	Project Duration (Start Date – Completion Date)	Consultant's Role (Main Consultant/ Subconsultant/ Partner in a JV)
<u>Government</u>					
<u>Private</u>					

Submitted by : _____
(Printed Name and Signature)

Designation : _____

Date : _____

Instructions:

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

STATEMENT OF THE CONSULTANT'S NATIONALITY

Securities and Exchange Commission

Bids and Awards Committee

SEC Headquarters, 7907 Makati Ave.

Salcedo Village, Brgy. Bel-Air, Makati City

Ladies/Gentlemen:

In compliance with the requirements of the Securities and Exchange Commission – Bids and Awards Committee (SEC-BAC) for the bidding of the **Consultancy Services for Investors in People (RFP No. 2022-TFB-55)**, I/we hereby declare the following:

1. [Select one and delete the rest].

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

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

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

2. That the following are the proposed Personnel:

Name of ALL Proposed Personnel	Proposed Position	Job Status*	Nationality	Proof of Identification
1.	Lead Consultant		Filipino	
2.	Team Member		Filipino	
3.	Team Member		Filipino	
4.	Team Member		Filipino	
5.	Team Member		Filipino	

**indicate whether Permanent (P) or Freelancer (F)*

3. That attached herewith are the Curriculum Vitae of the above-mentioned personnel (*Annex/es* _____); and
4. That the undersigned is/are the authorized representative/s for this public bidding as evidenced by herewith attached notarized authority.

Very truly yours,

Signature: _____

Name and Title of Authorized Signatory: _____ Name of

Consultant/Company: _____

Address: _____ Contact No/s. _____

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

ANNEX E

CURRICULUM VITAE (CV) FOR PROPOSED KEY PROFESSIONAL STAFF

Proposed Position:		<i>Please check:</i>			
		<input type="checkbox"/>	<input type="checkbox"/>		
		Key Personnel	Staff		
Personal Information					
Name: (Last Name, First Name, Middle Name)					
Address		Contact No.	Email Address		
Date of Birth		Citizenship	Civil Status		
Work Experience (start from the current employment)					
Company Name	Inclusive Dates		Total (Years, Months)	Position Title	Actual Duties and Responsibilities (specify if L&D, HR or OD-related)
	From	To			
Current Workload (include workload or projects from other companies, if any)					
Company Name	Inclusive Dates		Total (Years, Months)	Position Title	Actual Duties and Responsibilities
	From	To			
Relevant Training (within the last 10 years, start from the most recent)					
Course Title	Inclusive Dates		Location	No. of Hours	Conducted / Sponsored by
	From	To			
Education (start from the most recent)					
School	Inclusive Dates		Degree Course	Scholarships / Academic Honors Received	
	From	To			
Certificates, Other Credentials					

Title	Date Received

Note:

1. Photocopy of the following documents must be submitted together with the Curriculum Vitaeto evidence educational attainment, work experience and professional certifications:
 - Trainings Certification
 - Diploma for completed Degrees or Affidavit (in case of loss of Diploma)
 - Professional Certifications and/or Licenses (if applicable)
2. For incomplete Post-Graduate Studies, please indicate the number of units earned.

Certification:

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

Signature

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 _____.

TPF 1. 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:

TPF 2. CONSULTANT'S REFERENCES

Relevant Services Carried Out in the Last Five 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: _____

**TPF 3. 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.

**TPF 4. DESCRIPTION OF THE METHODOLOGY AND WORK PLAN FOR
PERFORMING THE PROJECT**

TPF 5. TEAM COMPOSITION AND TASK

1. Technical/Managerial Staff		
Name	Position	Task

2. Support Staff		
Name	Position	Task

3. Where applicable, indicate relationships among the Consultant and any partner and/or subconsultant, the Procuring Entity, the Funding Source and other parties or stakeholders.

--

TPF 7. TIME SCHEDULE FOR PROFESSIONAL PERSONNEL

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

Part-time: _____

Signature: _____
(Authorized representative)

Full Name: _____
Title: _____
Address: _____

TPF 8. 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. Interim Progress Report (a) First Status Report (b) Second Status Report	
3. Draft Report	
4. Final Report	

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;

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 ____.

Bid-Securing Declaration

(REPUBLIC OF THE PHILIPPINES)

CITY OF _____) S.S.

X-----X

Invitation to Bid *[Insert reference number]*

To: *[Insert name and address of the Procuring Entity]*

I/We, the undersigned, declare that:

1. I/We understand that, according to your conditions, bids must be supported by a Bid Security, which may be in the form of a Bid-Securing Declaration.
2. I/We accept that: (a) I/we will be automatically disqualified from bidding for any contract with any procuring entity for a period of two (2) years upon receipt of your Blacklisting Order; and, (b) I/we will pay the applicable fine provided under Section 6 of the Guidelines on the Use of Bid Securing Declaration, within fifteen (15) days from receipt of written demand by the procuring entity for the commission of acts resulting to the enforcement of the bid securing declaration under Sections 23.1(b), 34.2, 40.1 and 69.1, except 69.1 (f), of the IRR of RA 9184; without prejudice to other legal action the government may undertake.
3. I/We understand that this Bid-Securing Declaration shall cease to be valid on the following circumstances:
 - a. Upon expiration of the bid validity period, or any extension thereof pursuant to your request;
 - b. I am/we are declared ineligible or post-disqualified upon receipt of your notice to such effect, and (i) I/we failed to timely file a request for reconsideration or (ii) I/we filed a waiver to avail of said right;
 - c. I am/we are declared as the bidder with the Highest Rated Responsive Bid, and I/we have furnished the performance security and signed the Contract.

IN WITNESS WHEREOF, I/We have hereunto set my/our hand/s this ____ day of *[month]* *[year]* at *[place of execution]*.

[Insert NAME OF BIDDER'S AUTHORIZED REPRESENTATIVE]
[Insert signatory's legal capacity]

Affiant

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 ____.

FPF 1. 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 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.

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:

FPF 2. SUMMARY OF COSTS

Costs	Currency(ies) ³	Amount in Philippine Peso
Subtotal		
Local Taxes		
Total Amount of Financial Proposal		

³ In cases of contracts involving foreign consultants, indicate the exchange rate used.

FPF 3. BREAKDOWN OF PRICE PER ACTIVITY

Activity No.:	Activity No.:	Description:
Price Component	Currency(ies) ⁴	Amount in Philippine Peso
Remuneration		
Reimbursables		
Miscellaneous Expenses		
Subtotal		

⁴ In cases of contracts involving foreign consultants, indicate the exchange rate used.

FPF 4. BREAKDOWN OF REMUNERATION PER ACTIVITY

Activity No. _____		Name: _____		
Names	Position	Input ⁵	Remuneration Currency(ies) Rate	Amount
Regular staff				
Local staff				
Consultants				
Grand Total				_____

⁵ Staff months, days, or hours as appropriate.

FPF 5. REIMBURSABLES PER ACTIVITY

Activity No: _____ Name: _____

No.	Description	Unit	Quantity	Unit Price In	Total Amount In
1.	International flights	Trip			
2.	Miscellaneous travel expenses	Trip			
3.	Subsistence allowance	Day			
4.	Local transportation costs ⁶				
5.	Office rent/accommodation/ clerical assistance				
	Grand Total				

⁶ Local transportation costs are not included if local transportation is being made available by the Entity. Similarly, in the project site, office rent/accommodations/clerical assistance costs are not to be included if being made available by the Entity.

FPF 6. MISCELLANEOUS EXPENSES

Activity No. _____ Activity Name: _____

No.	Description	Unit	Quantity	Unit Price	Total Amount
1.	Communication costs between _____ and _____ (telephone, telegram, telex)				
2.	Drafting, reproduction of reports				
3.	Equipment: vehicles, computers, etc.				
4.	Software				
	Grand Total				_____