



CLARIFICATION BULLETIN NO. 1

20 May 2022

Attention: **All prospective bidders for the project**

BID REFERENCE NO. C-2022-05: PROCUREMENT OF SURVEY AND RESEARCH SERVICES FOR THE DESIGN AND IMPLEMENTATION OF THE CUSTOMER SATISFACTION SURVEY AND RESEARCH PROJECT OF THE DEVELOPMENT BANK OF THE PHILIPPINES FOR CY 2022

(ABC: PHP 1,500,000.00 all-in, inclusive of all applicable taxes/VAT, logistics, permit fees, transportation, out-of-pocket and all other related expenses necessary to completely accomplish the project)

Please be informed of the following:

1. **The deadline for the submission and opening of eligibility documents for the above-cited bid project is as follows:**

| ACTIVITY | TIME | VENUE |
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| Submission of Expression of Interest and Eligibility Documents | 26 May 2022 (Thursday) <u>**“On or before” 09:00 AM</u> | 6/F BAC Secretariat DBP Head Office, Makati City |
| Opening of Expression of Interest and Eligibility Documents | 26 May 2022 (Thursday) at 10:15 AM | 12/F Executive Staff Room, DBP Head Office, Makati City and via Zoom Meeting |

****Late bids shall not be accepted.***

2. **Please refer to the Section III. Eligibility Data Sheet for the detailed procedure and options for the submission and opening of bids. Bidders are encouraged to attend the bid opening through Zoom Meeting App.**
3. **Replies to queries of the bidders:**

| QUERY/CONCERN | CLARIFICATION |
|--|--|
| Is SLCC required? It is in the criteria but not in the checklist | Yes. The Single Largest Completed Contract (SLCC) can be validated in the Statement of Completed Contracts of Similar Nature within the last five (5) years per Tab 6 of the Revised Checklist of Requirements. Just need to indicate the SLCC. Please refer to the Revised Checklist of Requirements attached in this Clarification Bulletin No. 01 dated 20 May 2022. |



| QUERY/CONCERN | CLARIFICATION |
|--|--|
| CV must be certified by the employer - do we need to attach a separate certification for this or certificate of employment? or adding a clause of certification by the employer in the CV template and have it signed by the employer will suffice? | Bidders may either attach a separate certification for the certificate of employment or may add a clause of certification by the employer in the CV template and have it signed by the employer. |
| Are e-signatures acceptable? | Yes. Provided that the original signed bidding forms shall be submitted if declared as Single/Highest Rated Bidder. Per GPPB Resolution No. 09-2020 dated 07 May 2022, “xxx 3 (ii) use of other forms of digital or electronic signature in all procurement related document xxx” |
| Do we need to buy the bidding documents before the deadline of submission of eligibility documents (May 26) or is it after we get shortlisted? | No. For submission of eligibility requirements, payment is not required. Bid document fee shall be required only from bidders that are declared Short Listed and Eligible. |
| What specific REI date do we need to put in the EDS Form? | It should be the date of conformance to the bidding forms. |
| <p>We would like to humbly ask for your kind consideration in allowing us to still participate in this bid with just the following staff:</p> <ol style="list-style-type: none"> 1. Overall Project Manager 2. Assistant Project Manager 3. Statistician/Assistant Project Manager 4. Field Manager 5. Data Processing Manager 6. Field Supervisor (NCR) 7. Field Supervisor (Provincial Luzon) 8. Field Supervisor (Visayas) 9. Field Supervisor (Mindanao) 10. Data Processing Supervisor 11. Programmer/Scripter/Checker 12. Data Processing Assistant/Checker 13. Group Leader 1 14. Group Leader 2 15. Field Quality Checkers/Back-Checkers <p>Moreover, if we were still allowed to participate with this staff, how would this effect our score if at all for the Qualifications of Key Personnel, particularly that of the Technical Staff (10%)?</p> | <p>The stated personnel and their respective required numbers are in compliance to the Governance Commission for GOCCs (GCG) guidelines, as such bidders must comply.</p> <p>For reference, below is the link for the GCG guidelines relative to the conduct of the customer satisfaction survey:</p> <p><u>0Pcv1VVqGf08JtLrImIE.pdf (gcq.gov.ph)</u></p> |

4. **Revision on the Checklist of Requirements**

| FROM | TO |
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| <p>TAB 3</p> <p>Valid and current Certificate of PhilGEPS Registration (Platinum Membership), in three (3) pages, including Annex “A” or the List of Class “A” Eligibility Documents required to be uploaded and maintained current and updated in PhilGEPS in accordance with section 8.5.2. of the IRR of RA 9184.</p> <p>Only the current/updated Certificate of PhilGEPS Registration (Platinum Membership) shall be accepted during the opening of bids. Expired Certificate or any of the Eligibility Documents listed in Annex “A” shall be a ground for failure of the bidder.</p> | <p>Valid and current Certificate of PhilGEPS Registration (Platinum Membership), in three (3) pages, including Annex “A” or the List of Class “A” Eligibility Documents required to be uploaded and maintained current and updated in PhilGEPS in accordance with section 8.5.2. of the IRR of RA 9184.</p> <p>Only the current/updated Certificate of PhilGEPS Registration (Platinum Membership) shall be accepted during the opening of bids. Expired Certificate or any of the Eligibility Documents listed in Annex “A” shall be a ground for failure of the bidder. <u>Audited Financial Statement for CY 2020 is still acceptable as the deadline of submission of attachments to Annual Income Tax Return CY 2021 is until 31 May 2022 per BIR Revenue Memorandum Circular No. 46-2022.</u></p> <p>Please refer to the Revised Checklist of Requirements attached in this Clarification Bulletin No. 01 dated 20 May 2022.</p> |

4. **Bidders are reminded to use the Revised Checklist of Requirements as attached in this Clarification Bulletin No. 1 dated 20 May 2022.**
5. **The Eligibility Documents must be properly tabbed for easy reference and must be submitted in sequence/order per Revised Checklist of Requirements.**
6. **The BAC shall no longer entertain any question/request for clarification after the issuance of this Clarification Bulletin.**
7. Please be advised that bids submitted after the deadline shall only be marked for recording purposes, shall not be included in the opening of bids, and shall be returned to the bidder unopened.

For the guidance and information of all concerned.

SIGNED

ATTY. ERNESTO R. PRUGGANAN

Vice President, and

First Vice Chairperson, Bids and Awards Committee

PROCUREMENT OF SURVEY AND RESEARCH SERVICES FOR THE DESIGN AND IMPLEMENTATION OF THE CUSTOMER SATISFACTION SURVEY AND RESEARCH PROJECT OF THE DEVELOPMENT BANK OF THE PHILIPPINES FOR CY 2022
Bid Reference No. C-2022-05

TRANSMITTAL FORM

REVISED CHECKLIST OF REQUIREMENTS FOR BIDDERS

Note: Please fill-out this form and submit directly to the BAC Secretariat outside of the sealed envelopes.

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| FOR MACHINE STAMP (OFFICIAL TIME) BY THE DBP BAC SECRETARIAT |
| Received: _____ |

Name of Bidder: _____

Complete Address: _____

Submitted by: _____

Landline: _____ Email: _____

PART 1: DOCUMENTS COMPRISING THE ELIGIBILITY DOCUMENTS

| Item | FIRST ENVELOPE: ELIGIBILITY DOCUMENTS AND TECHNICAL REQUIREMENTS (DULY SEALED AND MARKED) |
|------------------------------------|---|
| LEGAL ELIGIBILITY DOCUMENTS | |
| TAB 1 | <p>If the bidder is a joint venture (JV):</p> <p>a. <u>If bidding as a formed JV</u>: Submit the existing valid, duly accomplished, signed and notarized JV Agreement (JVA). The JVA must specifically indicate among others, the following: the partner company that will represent the JV, the shareholdings of each partner company in the JV (to determine which partner company and its nationality has the controlling majority share), and the share of each partner company in the JV.</p> <p>Moreover, please likewise note:</p> <ol style="list-style-type: none"> 1) <u>If the JV is incorporated or registered with the relevant government agency</u>, all documents listed in this checklist must be under the JV's name and shall submit the PhilGEPS Certificate of Registration under Platinum Category also under the JV's name. 2) <u>If the JV is unincorporated</u>, the PhilGEPS Certificate of Registration under Platinum Membership shall be submitted by each of the JV partners, while submission of the technical and financial eligibility documents (Tab 4 onwards) by any one of the JV partners constitutes collective compliance. <p>b. <u>If bidding as a JV that is yet to be formed</u>: Submit duly notarized Agreement to Enter into Joint Venture (<i>Template per FORM I-A</i>). Please likewise note:</p> |

| Item | FIRST ENVELOPE: ELIGIBILITY DOCUMENTS AND TECHNICAL REQUIREMENTS (DULY SEALED AND MARKED) |
|-------|--|
| | <p>1) PhilGEPS Certificate of Registration under Platinum Membership shall be submitted by each of the JV partners, while submission of the technical and financial documents (Tab 4 onwards) by any one of the JV partners constitutes collective compliance.</p> |
| TAB 2 | <p>Proof of appointment/authority of bidder's representative:</p> <p>a. Duly notarized Special Power of Attorney (if the bidder is a sole proprietorship) (Template per FORM I-B1)</p> <p>OR</p> <p>b. Duly notarized Secretary's Certificate (if the bidder is a corporation, partnership, cooperative or joint venture)</p> <p>b.1 If the bidder is a corporation - Template per FORM I-B2</p> <p>b.2 If the bidder is an INCORPORATED JV- Template per FORM I-B3</p> <p>b.3 If the bidder is an UNINCORPORATED JV- Template per FORM I-B4 <i>Each JV partner must submit its duly notarized Special Power of Attorney or Secretary's Certificate, whichever is applicable, indicating therein the following:</i></p> <ol style="list-style-type: none"> 1. <i>That they are duly authorized to participate in the bidding as a JV;</i> 2. <i>The authorized Lead Company to represent the JV;</i> 3. <i>The person designated as the duly authorized representative of the JV to participate in the bidding, sign the bid proposals/bidding documents and sign the ensuing contract with DBP.</i> <p>b.4 If the bidder is a JV THAT IS YET TO BE FORMED-</p> <p><i>Each JV partner must submit its duly notarized Special Power of Attorney (SPA) or Secretary's Certificate (Template per FORM I-B5), whichever is applicable.</i></p> <p>IN CASE, THERE ARE MORE THAN ONE APPOINTED/DESIGNATED REPRESENTATIVE, USE OF "AND" shall mean both/all representatives must sign the bid forms (i.e. Statements, TOR, financial bid) to be submitted for the bid opening.</p> <p>Use of "OR" is recommended.</p> |
| TAB 3 | <p>Valid and current Certificate of PhilGEPS Registration (Platinum Membership), in three (3) pages, including Annex "A" or the List of Class "A" Eligibility Documents required to be uploaded and maintained current and updated in PhilGEPS in accordance with section 8.5.2. of the IRR of RA 9184.</p> <p>Only the current/updated Certificate of PhilGEPS Registration (Platinum Membership) shall be accepted during the opening of bids. Expired Certificate or any of the Eligibility Documents listed in Annex "A" shall be a ground for failure of the bidder. <u>Audited Financial Statement for CY 2020 is still acceptable as the deadline of submission of attachments to Annual Income Tax Return for</u></p> |

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|---|---|
| Item | FIRST ENVELOPE: ELIGIBILITY DOCUMENTS AND TECHNICAL REQUIREMENTS (DULY SEALED AND MARKED) |
| | <u>CY 2021 is until 31 May 2022 per BIR Revenue Memorandum Circular No. 46-2022.</u> |
| | <p><i>Only current/ updated PhilGEPS Certificate of Platinum membership shall be accepted during the opening of bids.</i></p> <p><i>Following are the related provisions/requirements based on GPPB Resolution 15-2021 dated 14 October 2021 regarding submission of valid/current PhilGEPS Certificate of Registration (Platinum Membership):</i></p> <ul style="list-style-type: none"> - <i><u>LIFT the suspension on the implementation of mandatory submission of the PhilGEPS Certificate of Registration (Platinum Membership) in Competitive Bidding and Limited Source Bidding, thus, fully enforcing Sections 8.5.2 and 54.6 of the 2016 revised IRR of RA No. 9184 starting 01 January 2022;</u></i> - <i><u>AMEND Sections 23.1(a)(ii) and 24.1(a)(ii) of the 2016 revised IRR of RA No. 9184 to reflect that the submission of the recently expired Mayor’s Permit together with the official receipt as proof that the prospective bidder has applied for renewal within the period prescribed by the concerned local government unit shall be accepted by the PhilGEPS for the purpose of updating the PhilGEPS Certificate of Registration (Platinum Membership) in accordance with Section 8.5.2 of the 2016 revised IRR of RA 9184.</u></i> |
| TAB 4 | Eligibility Documents Submission Form (Expression of Interest), per FORM I-C , must be signed by the authorized representative as named in the Secretary’s Certificate or in the Joint Venture Agreement |
| TECHNICAL ELIGIBILITY DOCUMENTS (for the following documents/requirements, in case of JV, submission of one partner constitutes collective compliance. | |
| TAB 5 | <p>Statement by the bidder of ALL its <u>ongoing</u> government and/or private contracts (including those awarded but not yet started, if any), whether similar or not similar in nature and complexity to the contract to be bid (include all contracts with the DBP for the said period, if any). (Template per FORM I-D), duly signed by the bidder’s authorized representative.</p> <p>Note: For bidders who have no ongoing government and/or private contracts, kindly indicate in their statement “NONE” to comply with the requirement. Bidders will be rated “failed” if no document is submitted or if the document submitted is incomplete or patently insufficient (<i>per GPPB NPM 094-2013 dtd 2013-12-19</i>).</p> |
| TAB 6 | <p>Statement of Completed Contracts of Similar Nature (Template per FORM I-E) <u>within the last five (5) years</u> prior to the deadline for the submission and receipt of eligibility documents, duly signed by the bidder’s authorized representative.</p> <p>Similar contract shall mean projects that involves the design and implementation of a customer satisfaction research.</p> <p>Each contract indicated in the statement shall be supported by a Copy of Certificate of Satisfactory completion or equivalent document issued by the bidder’s client (Template per FORM I-F)</p> |
| TAB 7 | Statement/Certificate on Consultant’s Nationality to be assigned to the project (per FORM I-G) , duly signed by the bidder’s authorized representative. |

| Item | FIRST ENVELOPE: ELIGIBILITY DOCUMENTS AND TECHNICAL REQUIREMENTS (DULY SEALED AND MARKED) | | | | | | | | | | | | | | | | | | |
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| TAB 8 | <p>Curriculum Vitae of EACH of the following consultants to be assigned to the project if awarded the contract:</p> <table border="1" data-bbox="311 347 1380 974"> <tr><td>1) Overall Project Manager</td></tr> <tr><td>2) Assistant Project Manager</td></tr> <tr><td>3) Statistician/Assistant Project Manager</td></tr> <tr><td>4) Field Manager</td></tr> <tr><td>5) Data Processing Manager</td></tr> <tr><td>6) Field Supervisors - NCR</td></tr> <tr><td>7) Field Supervisors – Provincial Luzon</td></tr> <tr><td>8) Field Supervisors - Visayas</td></tr> <tr><td>9) Field Supervisors- Mindanao</td></tr> <tr><td>10) Data Processing Supervisor -1</td></tr> <tr><td>11) Data Processing Supervisor -2</td></tr> <tr><td>12) Programmer/Scripter/Checker -1</td></tr> <tr><td>13) Programmer/Scripter/Checker-2</td></tr> <tr><td>14) Data Processing Assistant/Checker -1</td></tr> <tr><td>15) Data Processing Assistant/Checker-2</td></tr> <tr><td>16) Group Leader -1</td></tr> <tr><td>17) Group Leader - 2</td></tr> <tr><td>18) Field Quality Checkers/Back Checker</td></tr> </table> <p>The CV must be signed by the consultant, the authorized representative and certified by the employer.</p> <p>Note: Per Criteria, failure to meet the minimum eighteen (18) individual personnel requirement, shall be deemed ineligible. No multiple functions per person.</p> | 1) Overall Project Manager | 2) Assistant Project Manager | 3) Statistician/Assistant Project Manager | 4) Field Manager | 5) Data Processing Manager | 6) Field Supervisors - NCR | 7) Field Supervisors – Provincial Luzon | 8) Field Supervisors - Visayas | 9) Field Supervisors- Mindanao | 10) Data Processing Supervisor -1 | 11) Data Processing Supervisor -2 | 12) Programmer/Scripter/Checker -1 | 13) Programmer/Scripter/Checker-2 | 14) Data Processing Assistant/Checker -1 | 15) Data Processing Assistant/Checker-2 | 16) Group Leader -1 | 17) Group Leader - 2 | 18) Field Quality Checkers/Back Checker |
| 1) Overall Project Manager | | | | | | | | | | | | | | | | | | | |
| 2) Assistant Project Manager | | | | | | | | | | | | | | | | | | | |
| 3) Statistician/Assistant Project Manager | | | | | | | | | | | | | | | | | | | |
| 4) Field Manager | | | | | | | | | | | | | | | | | | | |
| 5) Data Processing Manager | | | | | | | | | | | | | | | | | | | |
| 6) Field Supervisors - NCR | | | | | | | | | | | | | | | | | | | |
| 7) Field Supervisors – Provincial Luzon | | | | | | | | | | | | | | | | | | | |
| 8) Field Supervisors - Visayas | | | | | | | | | | | | | | | | | | | |
| 9) Field Supervisors- Mindanao | | | | | | | | | | | | | | | | | | | |
| 10) Data Processing Supervisor -1 | | | | | | | | | | | | | | | | | | | |
| 11) Data Processing Supervisor -2 | | | | | | | | | | | | | | | | | | | |
| 12) Programmer/Scripter/Checker -1 | | | | | | | | | | | | | | | | | | | |
| 13) Programmer/Scripter/Checker-2 | | | | | | | | | | | | | | | | | | | |
| 14) Data Processing Assistant/Checker -1 | | | | | | | | | | | | | | | | | | | |
| 15) Data Processing Assistant/Checker-2 | | | | | | | | | | | | | | | | | | | |
| 16) Group Leader -1 | | | | | | | | | | | | | | | | | | | |
| 17) Group Leader - 2 | | | | | | | | | | | | | | | | | | | |
| 18) Field Quality Checkers/Back Checker | | | | | | | | | | | | | | | | | | | |
| TAB 9 | <p>Criteria for Eligibility/Shortlisting (per FORM I-H), duly signed by the bidder's authorized representative for conformance.</p> | | | | | | | | | | | | | | | | | | |