

# **PHILIPPINE BIDDING DOCUMENTS**

**Procurement of Consulting Services (Firm) for the  
Establishment of Monitoring & Evaluation  
System for the Climate Resilient and Farm  
Productivity Support (CRFPS) Project**

**Reference Number: PBD-043-2024-06-REBID**

**Government of the Republic of the Philippines  
Department of Agrarian Reform - Central Office**

**Fifth Edition  
August 2016**

# Preface

These Philippine Bidding Documents (PBDs) for the procurement of Consulting Services through Competitive Bidding have been prepared by the Government of the Philippines (GoP) for use by all branches, agencies, departments, bureaus, offices, or instrumentalities of the Government, including government-owned and/or -controlled corporations (GOCCs), government financial institutions (GFIs), state universities and colleges (SUCs), local government units (LGUs), and autonomous regional government. The procedures and practices presented in this document have been developed through broad experience, and are for mandatory use in projects that are financed in whole or in part by the GoP or the World Bank or any foreign government/foreign or international financing institution in accordance with the provisions of the 2016 Revised Implementing Rules and Regulations (IRR) of Republic Act 9184 (R.A. 9184).

The Bidding Documents shall clearly and adequately define, among others: (a) the objectives, scope, and expected outputs and/or results of the proposed contract; (b) the minimum eligibility requirements of bidders, such as track record to be determined by the Head of the Procuring Entity; (c) the expected contract duration, delivery schedule and/or time frame; and (d) the obligations, duties, and/or functions of the winning bidder.

In order to simplify the preparation of the Bidding Documents for each procurement, the PBDs groups the provisions that are intended to be used unchanged in ATTY. QUINTIN O. MAGSICO JR.

Assistant Secretary, Finance and Management Office, and Procurement-related Services Chairperson, Bids and Awards Committee

*Section II. Eligibility Documents* of Part I; and **Error! Reference source not found.** (ITB) and **Error! Reference source not found.** (GCC) of Part II. Data and provisions specific to each procurement and contract should be included in Section III. Eligibility Data Sheet (EDS) of Part I, **Error! Reference source not found.** (BDS), and **Error! Reference source not found.** (SCC) of Part II. The forms to be used are provided in the attachments.

Care should be taken to check the relevance of the provisions of the Bidding Documents against the requirements of the specific Consulting Services to be procured. The following general directions should be observed when using the documents:

- (a) All the documents listed in the Table of Contents are normally required for the procurement of Consulting Services. However, they should be adapted as necessary to the circumstances of the particular Project.
- (b) These PBDs are divided into Part I and Part II, which shall be both made available from the time the Request for Expression of Interest is first advertised/posted until the deadline for the submission and receipt of bids
- (c) Specific details, such as the “name of the Procuring Entity” and “address for proposal submission,” should be furnished in the EDS, BDS, and SCC. The final documents should contain neither blank spaces nor options.
- (d) This Preface and the footnotes or notes in italics included in the Request for Expression of Interest, EDS, BDS, SCC, Terms of Reference, and Appendices

are not part of the text of the final document, although they contain instructions that the Procuring Entity should strictly follow. The Bidding Documents should contain no footnotes except **Error! Reference source not found.** of Part II since these provide important guidance to Bidders.

- (e) The criteria for evaluation and the various methods of evaluation in the ITB should be carefully reviewed. Only those that are selected to be used for the procurement in question should be retained and expanded, as required in the BDS. The criteria that are not applicable should be deleted from the BDS.
- (f) The cover should be modified as required to identify the Bidding Documents as to the names of the Project, Contract, and Procuring Entity, in addition to date of issue.
- (g) If modifications must be made to bidding procedures, they can be presented in the BDS. Modifications for specific Project or Contract should be provided in the SCC as amendments to the Conditions of Contract. For easy completion, whenever reference has to be made to specific clauses in the EDS, BDS, or SCC these terms shall be printed in bold type face on Section II. Eligibility Documents, Section I. Instructions to Bidders, and Section III. General Conditions of Contract, respectively.

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## ***Section I. Request for Expression of Interest***

### **Notes on Request for Expression of Interest**

The Request for Expression of Interest provides information that enables potential Bidders to decide whether to participate in the procurement at hand. The Request for Expression of Interest shall be:

- (a) Posted continuously in the Philippine Government Electronic Procurement System (PhilGEPS) website and the website of the Procuring Entity concerned, if available, and the website prescribed by the foreign government/foreign or international financing institution, if applicable, seven (7) calendar days starting on the date of advertisement; and
- (b) Posted at any conspicuous place reserved for this purpose in the premises of the Procuring Entity concerned for seven (7) calendar days, as certified by the head of the Bids and Awards Committee (BAC) Secretariat of the Procuring Entity concerned.
- (c) Advertised at least once in a newspaper of general nationwide circulation which has been regularly published for at least two (2) years before the date of issue of the advertisement, subject to Sections 21.2.1(c) of the IRR of R.A. 9184<sup>1</sup>;

Apart from the essential items listed in the Bidding Documents, the Request for Expression of Interest should also indicate the following:

- (a) The date of availability of the Bidding Documents, the place where it may be secured and the deadline for submission of the Expression of Interest (EOI) together with the application for eligibility;
- (b) The set of criteria and rating system for short listing of prospective bidders to be used for the particular contract to be Bid, which shall consider the following, among others:
  - (i) Applicable experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firms or, in the case of new firms, the individual experiences of the principal and key staff, including the times when employed by other consultants;
  - (ii) Qualification of personnel who may be assigned to the job vis-à-vis extent and complexity of the undertaking; and
  - (iii) Current workload relative to capacity;

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<sup>1</sup> Two years after effectivity of the 2016 Revised IRR of RA 9184 on **28 October 2016**, advertisement in a newspaper of general nationwide circulation shall no longer be required. However, a Procuring Entity that cannot post its opportunities in the PhilGEPS for justifiable reasons shall continue to publish its advertisements in a newspaper of general nationwide circulation.

- (c) The number of consultants to be short listed and the procedure to be used in the evaluation of Bids of short listed consultants, *i.e.*, QBE or QCBE; and if QCBE, the weights to be allocated for Technical and Financial Proposals; and
- (d) The contract duration.

In the case of WB funded projects, the Request for Expression of Interest shall be sent to all who have expressed an interest in undertaking the services as a result of any General Procurement Notice issued. In addition, it shall also be sent to all heads of associations of consultants within the area where the project will be undertaken.



**REQUEST FOR EXPRESSION OF INTEREST FOR THE  
PROCUREMENT OF CONSULTANCY SERVICES (FIRM) FOR THE  
ESTABLISHMENT OF MONITORING & EVALUATION SYSTEM FOR  
THE CLIMATE RESILIENT AND FARM PRODUCTIVITY SUPPORT  
(CRFPS) PROJECT**

**REFERENCE NUMBER: PBD-043B-2024-06-REBID**

1. The Department of Agrarian Reform Central Office, through the CY 2024 General Appropriations Act intends to apply the sum of Three Million Nine Hundred Ninety-Eight Thousand Four Hundred Pesos only (₱3,998,400.00) being the Approved Budget for the Contract (ABC) to payments under the contract for the Procurement of Consultancy Services (Firm) for the Establishment of Monitoring & Evaluation System for the Climate Resilient and Farm Productivity Support (CRFPS) Project. Bids received in excess of ABC shall be automatically rejected at the opening of the financial proposals.
2. The *Department of Agrarian Reform Central Office* now calls for the submission of eligibility documents for the *Procurement of Consultancy Services (Firm) for the Establishment of Monitoring & Evaluation System for the Climate Resilient and Farm Productivity Support (CRFPS) Project*. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before **October 22, 2024, at 9:30 am** at the *Procurement Division Office, Ground Floor, DAR Central Office, Elliptical Road, Diliman, Quezon City*. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.
3. Bidders should have completed, within the last five (5) years from the date of submission and receipt of eligibility documents, a contract similar to the Project. The description of an eligible bidder is contained in Part I Bidding Documents, particularly, in Section III, Eligibility Data Sheet.
4. Interested bidders may obtain further information from the DARCO Bids and Awards Committee Secretariat and inspect the Bidding Documents at the address given below starting on **October 15, 2024**, from 8:00 a.m. to 5:00 p.m. Mondays to Fridays.
5. Bidding Documents may be acquired by interested Bidders from October 15, 2024, at 08:00 am at the Office of the Procurement Division, Ground Floor, DAR Central Office Main Building, DAR Compound, Elliptical Road, Diliman, Quezon City.

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.

6. The DAR-BAC shall draw up the shortlist of consultancy firms 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, preferably, of three (3) prospective bidders who will be entitled to submit bids. Should only one or less than the preferred number apply for eligibility and shortlisting, pass the eligibility check, and/or pass the minimum score

required in the shortlisting, the BAC shall consider the same. The criteria and rating system for shortlisting are:

- |  |             |
|--|-------------|
| a) Applicable Experience of the Consulting Firm- | 50 points   |
| b) Qualifications of principal and key staff     | - 30 points |
| c) Absorptive Capacity                           | - 20 points |

**Passing score is 75 points.**

7. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the 2016 Revised IRR of RA 9184.

Bidding 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.

8. The Procuring Entity shall evaluate bids using the Quality-Cost Based Evaluation procedure. Bids whose technical proposal passes the minimum technical requirement of eighty (80) points shall have its financial proposals opened and evaluated. The technical proposal shall carry sixty percent (60%) weight in the evaluation and the financial proposal is forty percent (40%). The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders. Financial bids that exceed the ABC shall be automatically rejected at bid opening.
9. The contract shall be completed within One Hundred Eighty (180) calendar days upon the Consultant’s receipt of the Notice to Proceed (NTP).
10. The DAR 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.
11. For further information, please refer to:

**Atty. Shiela Mae Gerapusco**

DAR-Bac Secretariat Chairperson  
Office of the Asst. Secretary for FMS-  
PRS 2<sup>nd</sup> Floor, DAR Central Office  
Elliptical Road, Diliman, Quezon City  
Telephone Numbers: 8928-1011;  
09667812052

Email address: [darco.bacsecretariat.a@dar.gov.ph](mailto:darco.bacsecretariat.a@dar.gov.ph)

**14 October 2024**

  
**ATTY. QUINTIN O. MAGSICO JR.**

Assistant Secretary, Finance and Management Office, and Procurement-related Services  
Chairperson, Bids and Awards Committee



## ***Section II. Eligibility Documents***

### **Notes on the Eligibility Documents**

This Section provides the information necessary for prospective bidders to prepare responsive Eligibility Documents in accordance with the requirement of the Procuring Entity.

The provisions contained in this Section are to be used unchanged. Additional information or requirements specific to each procurement shall be specified in the EDS.

## 1. Eligibility Criteria

- 1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:
  - (a) Duly licensed Filipino citizens/sole proprietorships;
  - (b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;
  - (c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;
  - (d) Cooperatives duly organized under the laws of the Philippines; or
  - (e) Persons/entities forming themselves into a joint venture, *i.e.*, a group of two (2) or more persons/entities that intend to be jointly and severally responsible or liable for a particular contract: Provided, however, That Filipino ownership or interest thereof shall be at least sixty percent (60%). For this purpose, Filipino ownership or interest shall be based on the contributions of each of the members of the joint venture as specified in their JVA.
- 1.2. When the types and fields of Consulting Services involve the practice of professions regulated by law, those who will actually perform the services shall be Filipino citizens and registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions specified in the **EDS**.
- 1.3. If the Request for Expression of Interest allows participation of foreign consultants, prospective foreign bidders may be eligible subject to the conditions stated in the **EDS**.
- 1.4. Government owned or –controlled corporations (GOCCs) may be eligible to participate only if they can establish that they (a) are legally and financially autonomous, (b) operate under commercial law, and (c) are not attached agencies of the Procuring Entity.

## 2. Eligibility Requirements

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

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

Technical Documents

- (ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:
  - (ii.1) the name and location of the contract;
  - (ii.2) date of award of the contract;
  - (ii.3) type and brief description of consulting services;
  - (ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)
  - (ii.5) amount of contract;
  - (ii.6) contract duration; and
  - (ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- (iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

- (b) Class "B" Document –

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

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation of

the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.

- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, subconsultants may only participate in the bid of one short listed consultant. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.

### **3. Format and Signing of Eligibility Documents**

- 3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.
- 3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.
- 3.3. The Eligibility Documents Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.
- 3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

### **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 5 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.

## ***Section III. Eligibility Data Sheet***

### **Notes on the Eligibility Data Sheet**

This Section is intended to assist the Procuring Entity in providing the specific information and requirements in relation to corresponding clauses in the Eligibility Documents, and has to be prepared for each specific procurement.

The Procuring Entity should specify in this Section the information and requirements specific to the circumstances of the Procuring Entity, the processing of the eligibility, and the rules that will apply in the determination and evaluation of eligibility.

In preparing this Section, the following aspects should be checked:

- (a) Information that specifies and complements provisions of the Eligibility Documents must be incorporated.
- (b) Amendments and/or supplements, if any, to provisions of the Eligibility Documents as necessitated by the circumstances of the specific procurement, must also be incorporated.



# Eligibility Data Sheet

Eligibility Documents	
1.2	The professionals required to provide services shall be those involved in establishing monitoring and evaluation systems in government agencies that implement rural development projects and provide assistance, preferably to the environment, agrarian, and agriculture sectors.
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 within five (5) years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.4)	Statement of the consultant specifying its nationality and confirming that those who will perform the services are registered professional in their Country of Origin authorized by the appropriate regulatory body to practice those professions and allied professions.
2.1(a)(ii.7)	No substitute for the certificate of satisfactory completion issued by the respective client/s.
4.2 (0)	Each prospective bidder shall submit one (1) original and four (4) copies of its eligibility documents.
4.3 (e)	<b>Bids and Awards Committee Department of Agrarian Reform Central Office 2<sup>nd</sup> Floor, Foreign Assisted and Special Project Office Elliptical Road, Diliman, Quezon City</b>
4.3 (f)	Consulting Services (Firm) for the Establishment of Monitoring & Evaluation System for Climate Resilient and Farm Productivity Support (CRFPS) Project.
5 (5)	The address for submission of eligibility documents is the <b>Department of Agrarian Reform Central Office, Procurement Division, Ground Floor, Elliptical Road, Diliman, Quezon City</b>  The deadline for submission of eligibility documents is <i>October 22, 2024, at 09:30 a.m.</i>
8.1 (0)	The place of opening of eligibility documents is: <b>Department of Agrarian Reform Central Office 2<sup>nd</sup> Floor, Foreign Assisted and Special Project Office Elliptical Road, Diliman, Quezon City</b>

	The date and time of opening of eligibility documents is <i>October 22, 2024 at 10:00am.</i>
9.1	Similar contracts shall refer to the Establishment of a Monitoring and Evaluation System for government agencies implementing rural development projects and providing assistance, preferably to the environment, agrarian, and agriculture sectors.
9.2 (0)	<p>The criterion and rating system to be used are:</p> <p><b>a) Applicable Experience of the Consulting Firm..... 50%</b></p> <p><b>b) Qualifications of principal and key staff of the consultant who may be assigned to the job vis-a-vis- extent of complexity of the undertaking ..... 30%</b></p> <p><b>c) Absorptive Capacity..... 20%</b></p>

## **CHECKLIST OF REQUIRED DOCUMENTS FOR ELIGIBILITY AND SHORTLISTING OF CONSULTING FIRMS**

### **A. Class “A” Documents**

#### Legal Documents

1. Valid PhilGEPS Certificate of Registration (Platinum Membership);

#### Technical Documents

1. 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 last five (5) years. The statement shall include, for each contract the following:
  - a) the name and location of the contract;
  - b) date of award of the contract;
  - c) type and brief description of consulting services;
  - d) consultant’s role (whether main consultant, sub-contractor, or partner in a joint venture);
  - e) amount of contract;
  - f) contract duration; and
  - g) certificate of satisfactory completion issued by the client
2. Statement of the consultant specifying its nationality and confirming those who will actually perform the services are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions. The curriculum vitae of said professionals should be attached to the statement.

### **B. Class “B” Documents**

Duly signed valid Joint Venture Agreement, if applicable.

Standard Form Title: **Statement of On-going Projects**

**List of Ongoing Government and Private Contracts, including those awarded but not yet started**

Name of Consultant : \_\_\_\_\_  
 Business Address : \_\_\_\_\_

Name and Location of Project	Description of the Project	Classification (Government / Private)	Date of Contract	Type of Consulting Services	Amount of Contract	Contract Duration
1						
2						
3						
4						
5						
6						
7						
8						
9						

Attachments:

1. Notice of Award and / or Contract
2. Notice to Proceed issued by the Owner

Submitted by:

Name of Representative of Bidder

Position

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

*One of the technical documents to be in the Eligibility Envelope of the bidder is a statement of all its on-going contracts, including those awarded but not yet started.*

Standard Form Title: **Statement of Similar Completed Projects  
Within five years (2020-2024)**

**List of Completed Government and Private Contracts**

Name of Consulting Firm: \_\_\_\_\_  
Business Address : \_\_\_\_\_

Name and Location of Project	Description of the Project	Classification (Government / Private)	Date of Contract	Type of Consulting Services	Amount of Contract	Contract Duration
1						
2						
3						
4						
5						
6						
7						
8						
9						

Attachments: Certificate of satisfactory completion issued by the client

Submitted by:

Name of Representative of Bidder

Position

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

*One of the technical documents to be in the Eligibility Envelope of the bidder is a statement of all its completed contracts within the period specified in the Eligibility Data Sheet*

Standard Form Title: **STATEMENT ON PRINCIPAL AND KEY STAFF FOR CONSULTING SERVICES**

**Date of Issuance**

Chairman, Bids and Awards Committee  
Department of Agrarian Reform Central Office  
Elliptical Road, Diliman, Quezon City

Dear Sir/Madame:

In compliance with the requirements of the DAR-BAC for the Request for Expression of Interest for the Procurement of Consulting Services for the conduct of Competency Model Development for Program Beneficiaries Development Job Sector, we certify that all of the owners/principals/ partners and key staff of (Name of the Bidder) are Filipino citizens and possess the required professional licenses issued by the Professional Regulation Commission or other appropriate regulatory body.

Name & Title	Degree	Years of Experience in IT-based System Design & Development	Age	Nationality
1.				
2.				
3.				
4.				
5.				

Attached are their bio-data.

Very truly yours,

Name of Authorized Representative  
Position  
Name of the Bidder

*If the prospective bidder is a juridical entity, one of the Class "A" technical documents required for eligibility is its statement of the kinds and number of its ownership and key staff, partners or principal officers, as the case may be, as well as their respective curriculum vitae (IRR-A 24.7.1.1.h.1) and when the types and fields of consulting services in which the bidder wishes to engage involve professions regulated by the laws of the Philippines, the owner and key staff, and all the partners of the professional partnership firm, as the case may be, and those who will actually perform the service, are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions (IRR-A 24.7.1.1.h.2)*

## **TERMS OF REFERENCE**

### **ENGAGEMENT OF AN EXTERNAL SERVICE PROVIDER FOR THE ESTABLISHMENT OF MONITORING EVALUATION FOR THE PROJECT CLIMATE RESILIENT AND FARM PRODUCTIVITY SUPPORT (CRFPS) PROJECT**

#### **I. INTRODUCTION**

One of the major steps undertaken to address climate change vulnerability and impacts is on-field application of Climate-resilient agriculture which focuses on food security, resilience building, and disaster risk reduction. The Department of Agrarian Reform through the ARBDSP program implements the Climate Resilient Farm Productivity Support Project (CRFPSP) pursuant to the mandate of RA 9729 otherwise known as Climate Change Act of the Philippines. *Recognizing the vulnerability of the Philippine archipelago and its local communities, particularly the poor, women, and children, to potential dangerous consequences of climate change such as rising seas, changing landscapes, increasing frequency and/or severity of droughts, fires, floods and storms, climate-related illnesses and diseases, damage to ecosystems, biodiversity loss that affect the country’s environment, culture, and economy, the State shall cooperate with the global community in the resolution of climate change issues, including disaster risk reduction<sup>2</sup>.*

The Climate Resilient Farm Productivity Support (CRFPS) Project is anchored on the need to improve the adoption of climate-resilient agriculture with its goals for food security and sustainable agricultural growth in the face of the challenges of climate change. The project aims to provide support interventions toward increased productivity, and enhanced resilience for farmers, particularly the men and women ARBs involved in crop and livestock production.

In response to the need to provide assistance to farmers given the prevailing situation on the effects of climate change which threatens our food security, the CRFPS is implemented to provide support services to at least 50% of the ARB population in ARCs involved in crop and livestock production<sup>3</sup>.

The considerations/premises for designing the program implementation efforts and M&E design and execution as well, under the holistic approach to ensuring the attainment of the desired results and outcomes of the Program shall be anchored on the following project components:

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<sup>2</sup> <https://www.officialgazette.gov.ph/2009/10/23/republic-act-no-9729/>

<sup>3</sup> *SuRe ARC Project Document*

1. **Gender-Inclusive Organizational Building and Strengthening (OBAS)** - this is directed toward developing men and women ARBs' and their organizations' potential to manage, direct, and take responsibility for their sustained development through the effective application of clustering and value chain approach.
2. **Gender-Responsive Agri-Enterprise Development through Business Development Services (BDS) and ARB Market Development.**
3. **Climate-resilient Farm Productivity and Livelihood Support** **which** involves the provision of agri-extension, technology transfer with farm input support, and farm machinery and equipment.

**The project's sub-components are the following:**

- a. Major Crop-based Block Farm Areas Productivity Support - These are contiguous farm areas where ARBs and non-ARBs are individually or collectively engaged in the production of major crops that primarily includes, among others, rice, corn, and other crops, such as, bananas, pineapple, and vegetables. The purpose of the support intervention would be to improve efficiency in performing farm operations, optimize land utilization, and increase crop productivity to enhance the level of production that would lead enterprise development through a value-chain mechanism and reel the production in the market.
- b. Sustainable Livelihood Support for Disaster Affected Areas - This component covers support for post-disaster rehabilitation for affected ARCs. This is pursued through developing alternate agri-based livelihood or restoration/ rehabilitation of the existing agri-based livelihood of ARBs that were affected by increased intensity and frequency of extreme events such as drought and floods.

The integrated M&E system will be designed and executed as a complementing and integrated structural design and process to improve the implementation efforts of the CRFPS project as it is being pursued. Through the established technology based M & E system, results of the support intervention provided through OBAS, EDES support facilities with AES, and all data needs for the M&E evaluation function will be generated real time producing accurate and reliable reports.

Ensuring the integration of the implementing capabilities, resources, reach and coverage for the program with the M&E processes proposed will result in more convenient or expeditious fulfillment of the outputs and outcomes targeted. Integrating the M&E function and requirements means that all the proper data sets/coverage are included and always adequately reported in the process of pursuing the normal program implementation standard operating procedures (SOPs).

The normal reporting function in all program implementation efforts is seen as the main avenue/channel for use by the proposed M&E system to also record and help ensure that the implementation efforts are always **on-**



***track, on-time, and on-target*** (i.e., with reference to the M&E targeted outputs, milestones, performance indicators, outcome scenarios, etc.).

To measure the results of project interventions and ensure timely delivery of outputs, support knowledge sharing and learning, and put in place adaptive project management during the implementation period, an IT-enabled CRFPS M&E system shall be developed and installed at all levels (DARCO, concerned DARROs and DARPOs).

The system will facilitate effective and timely management and utilization of information for programming, planning, decision-making for policy intervention, and good resource management. In consideration of its technical limitation on the development and installation of an automated M & E system, the Support Services Office through the BARBD shall engage a firm in the development of CRFPS Project web-based Management Information System.

The consulting firm to be engaged will directly coordinate with the direct the BARBD through the Livelihood Enterprise Development Division (LEDD).

## **V. OBJECTIVES**

Generally, the M & E system will be established to track the progress of implementation of the project and enable strategic decision-making toward the achievement of project goals and objectives.

Toward this end, the proposal specifically aims to:

- ✓ Develop an M & E system for evidence-based reporting of outputs and outcomes which more effectively and efficiently captures valid and/or validated data and information;
- ✓ Establish a user-friendly online information system to monitor a wide range of data that will be transformed into useful information as basis for accurate and timely management decision-making
- ✓ Be able to generate informed planning, program management and supervision at all levels from the timely and continuous influx of graduated and evaluated critical information that is appropriate to the level of management intervention; and
- ✓ Capacitate the M & E focal persons involved.

## **VI. SCOPE OF WORK**

The establishment of the CRFPS M & E will involve the following:

### **A. Systems Design and Development**

The development of the project M & e system will be undertaken to track the progress of project implementation and measure the results of support interventions provided therein. The LEDD has an existing real-time monitoring tool which is updated every quarter by the field offices. The generation of the data (i.e., consolidation and processing using Excel program, done manually and separately) is tedious and laborious, as well as prone to errors (technical/procedural and/or substantive).

The magnitude of the database involved in monitoring the support intervention provided under the project warrants a user-friendly online information system to monitor a wide range of data that will be transformed into useful information as basis for accurate and timely management decision-making.

The engagement of a consulting firm for the establishment of the project's M & E system will focus on the development and installation of a technology-based Monitoring and Evaluation System for use of the Bureau of Agrarian Reform Beneficiaries Development (BARBD), 15 Regional Offices, and 79 Provincial Offices.

Key tasks to be undertaken are as follows:

1. Review of the Project results framework and indicators
2. Evaluation of the strengths and weaknesses of existing hardware and software technology and identify challenges encountered.
3. Review of existing M & E tools (real-time monitoring tool, ARBDSP Forms 5 (ARB training/served), 10 (Project milestones) & 11 (support facilities) and other data capture and reporting forms.
4. Identification of indicators and reports
5. Data capture forms development
6. Pre-testing of instruments/forms
7. Design and Development of the information system (forms and automation program)
8. Pilot testing of the data capture form and data transmission, run of the system developed
9. Enhancement of data entry application, database management and the portal
10. Initial debugging
11. System Transfer
12. Learning sessions of project focal persons (as resource person)
13. Operation manual development

## **B. Systems Installation and Roll out**

The CRFPS M & E system shall be designed to monitor whether the desired project result is achieved and assess how said result is attained following the system plan.

The system shall be installed at the LEDD-BARBD which shall see the overall management of the system, at the Regional Office (through the Regional Program Beneficiaries Development (RPBD) and at the Provincial Offices through the Provincial Program Beneficiaries Development Division (PPBD) for the data capture, initial processing, storage and use in the project.

Specifically, the data capture shall be undertaken at the project site. The PPBD shall take care of the data entry and database management of all relevant information at the provincial level. The PPBD in its data processing shall ensure the accuracy and completeness of reports, which shall be submitted to RPBD for review and consolidation. The RPBD which shall have a regional picture of the project status shall submit the regional processed data with analysis to the Livelihood Enterprise Development Division (LEDD) of the Bureau of Agrarian Reform Beneficiaries Development (BARBD) at the DAR Central Office. The

BARBD-LEDD will be responsible for the overall database management for program level reporting.

To ensure a seamless flow of data from the field office to the central office, system transfer will be undertaken by the Consulting Firm with the DAR Central Office and Field offices (Regional and Provincial focal persons) for the system navigation, data processing and analysis.

## II. EXPECTED OUTPUTS

The activity shall produce the following outputs:

1. Report on the review of existing M & E System
2. Framework of workable M & E System for CRFPS
3. System plan of CRFPS Information System (IS) –development of browser based data collection system
  - Instrument/s Pretesting to Pilot Testing of the data capture forms (including transmission) to firming up
  - Data Capture forms Development (No. of ARBs, No. of ARBOs, No. of ARCs covered, benefitted, served; functionality and utilization into production to enterprise, sales generated
  - Server setup
  - Portal development
  - Data cleaning, processing and transfer
  - Data visualization/dashboard
  - Report Generation and analysis
4. CRFPS IS Prototype/Alpha Version
5. CRFPS IS Beta Version
6. CRFPS IS Version 1.0 linked through the report generation application
7. Manual of Operation (soft and hard copy)/Systems Documentation
8. Codes and software turnover

Upon completion of the above-stated outputs, the engaged service provider shall issue a warranty for at least three months of free post-implementation support to BARBD.

## III. DELIVERABLES AND TIMELINE

The engagement is expected to run for a period of 24 weeks or approximately for a period of six (6) months. It should commence immediately after the signing of contract. Presented below are the deliverables based on activities:

Activities	Experts Involved	Person days	Target Outputs/Deliverables
<b>A. Inception Phase</b>			
1. Review of the Project results framework and indicators	System Developer & M & E Specialist -do-	22	<ul style="list-style-type: none"> <li>• Inception Report</li> <li>• Initial sampling methodology for M &amp; E System</li> <li>• Assessment of the existing M&amp;E tools,</li> </ul>
2. Evaluation of the strengths and weaknesses of existing hardware and software technology and identify challenges encountered.			
3. Review of existing M & E tools and other data capture and reporting forms Review and assess the existing M&E tools,			

Activities	Experts Involved	Person days	Target Outputs/Deliverables
including data capture and reporting forms. 4. Review sampling methodology for M & E System 5. Information Technology Scoping			data capture and reporting forms
<b>B. Implementation Phase (Design and Development)</b>			
1. Identification of indicators and reports Identify key indicators and report formats for the M&E system. 2. Data capture forms development Design data capture forms that align with identified indicators and project goals. 3. Pre-testing of instruments/forms Pre-test M&E instruments and forms to ensure accuracy and usability. 4. Design and Development of the information system (forms and automation program) 5. Pilot testing of the data capture form and data transmission, run of the system developed 6. Enhancement of data entry application, database management and the portal 7. Initial debugging Conduct initial debugging and refine the system based on pilot test results. 8. Develop system plan of CRFPS Information system (IS) 9. Create a Prototype CRFPS IS 10. Develop the Information system (IS) Beta Version 11. Pilot Test the Beta Version 12. Enhance CRFPS IS Beta Version and create Version 1 13. User acceptance (debugging) Conduct user acceptance testing and make necessary enhancements for the final version. 14. Enhance CRFPS IS Version 1	System Developer & M & E Specialist with programmer -do- -do- -do- -do- -do-	92	System Design and framework System Plan of CRFPS Information System (IS) CRFPS IS Prototype M & E Forms (data capture and report form) CRFPS Beta Version (Trial run of the MELA IS) CRFPS IS Version 1 (first Release)
<b>C. Transfer Phase</b>			
1. Facilitate system transfer and navigation 2. Development of manual	M & E Specialist -do- -do-	30	Regular operation and maintenance of the M & E system (data migration from old M & E system to CRFPS IS) Manual of Operation <ul style="list-style-type: none"> <li>• Codes and software turnover               <ul style="list-style-type: none"> <li>○ Service guaranty for at least one year free post implementation support to BARBD</li> </ul> </li> </ul>

Specifically, the following are the schedules for each deliverable:

### IMPLEMENTATION SCHEDULE

ACTIVITIES	MONTH 1				MONTH 2				MONTH 3				MONTH 4				MONTH 5				MONTH 6			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
<b>A. Inception Phase</b>																								
• Review of the Project results framework and indicators																								
• Evaluation of the strengths and weaknesses of existing hardware and software technology and identify challenges encountered.																								
• Review of existing M & E tools and other data capture and reporting forms • Review sampling methodology for M & E System																								
• Information Technology Scoping																								
<b>B. Implementation Phase</b>																								
1. Identification of indicators and reports																								
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<b>C. Transfer Phase</b>																								
1. Facilitate system transfer and navigation																								
2. Development of manual																								
<b>D. Conclusion Phase*</b>																								
1. Agreement on system maintenance																								

#### **IV. QUALIFICATIONS**

To be considered in this project, the firm must demonstrate capacity or capabilities in the following:

- a. Have legal status enabling the organization to perform the abovementioned tasks;
- b. Demonstrated experience in planning or organizing the task of establishing M & E on the scale of this project in relation to social enterprise operations of farmers organizations over the past five (5) years;
- c. Strong capacity and experience in fields of information technology particularly in database design, mobile data collection, web application development, systems administration related to agri-enterprise and farmers organizations activities to ensure high quality data output;
- d. Ability to assign Systems Development/M & E team with members composed of and possessing the following experience, skill and capabilities:
  1. Systems Development/Team Leader - should possess a Bachelor's Degree in either the following disciplines: Statistics, Economics, or Information Technology (preferably with bias towards monitoring and evaluation). He or she should have extensive practical experience with at least five (5) years in carrying out databases and M & E system automation with core competencies on M & E Concepts, design and development of M&E System for private and government institutions. Extensive experience in database design, management, and optimization. Experience in leading technical teams and managing end-to-end system development projects. Expertise in designing and developing robust, scalable systems that integrate multiple data sources and support reporting requirements. Experience with M&E systems is an advantage. Ability to integrate various software and tools into a cohesive M&E system, ensuring seamless data flow and accessibility across different levels of users. Commitment to understanding and addressing client needs, with a focus on delivering high-quality, user-centric solutions.
  2. M & E Specialist - A degree in a relevant field such as Statistics, Economics, Social Sciences, Agriculture, Environmental Science, or Information Technology. Minimum of 5 years of experience in Monitoring and Evaluation, with a focus on agriculture, climate resilience, or related development projects. Demonstrated experience in designing and implementing M&E systems, particularly for large-scale, multi-sectoral projects. Experience working with IT-enabled M&E systems, including data management, analysis, and visualization tools. Prior experience in conducting evaluations and developing methodologies for tracking project outcomes and impacts. Familiarity with the challenges of working in a developing country context, particularly in rural or agricultural settings.

3. IT Specialist - The consultant should hold a bachelor's degree in computer Programming or related field. He or she should have extensive practical experience within the least three (3) years software development.
- e. Demonstrate skills and experience in project management, database design, data management and statistics; data processing, visualization for analysis and report generation and
  - f. Be ready to assume work as soon as possible.

## **V. PAYMENT SCHEDULE**

The indicative budget for this engagement amounts to Six Million Five Hundred Fourteen Thousand Two Hundred Pesos (P6,514,200.00) inclusive of appurtenant taxes and all operating costs relevant to the delivery of outputs except for related meetings/activities convened by DAR field offices and/or BARBD.

As an output-based engagement, payments shall be made in tranches subject to the delivery of the outputs no later than the specified schedule and issuance of a Certificate of Acceptance by the BARBD to confirm the acceptability of the Firm's outputs.

For the purpose of processing the payment of the Firm, an electronic copy and one printed copy of each of the abovementioned outputs shall be submitted to DAR for the following tranches:

10%	Upon signing of the Contract and submission/presentation of necessary documents (CV, TIN and Phil Health Number) This amount is considered as advances until they submit their actual timesheet and workdays as part of the second tranche.  Submission of Inception Report
30%	Upon completion of data capture and consolidation forms/tools in appropriate and efficient format, duly checked; submission of timesheets/work program. Presentation of System Plan of CRFPS Information System (IS)
25%	Upon initial installation of the system at all levels. ICRFPS Beta Version
25%	Upon final adjustments based on result of initial installation (system transfer)
10%	Upon full implementation of the system (codes and software). Submission of Operation Manual

## **VI. REPORTING AND WORKING ARRANGEMENTS**

This establishment of the M & E for the CRFPS-SuRe ARC project will be executed by a Firm with the collaboration of DAR-BARBD. It shall work closely with the Livelihood Enterprise Development Division (LEDD) of BARBD all throughout the duration of the assignment. The Firm through its Team Leader will report directly to the BARBD Director. He/she shall have as counterparts the CARPO for Livelihood Enterprise Development Division (LEDD) of BARBD and concerned Regional Directors and PARPOs through the CARPOs of Regional and Provincial Program Beneficiaries Development Division (RPBDD/PPBDD).

Roles and Responsibilities:

The Consulting Firm:

- a. Prepares and submit Inception Report on the requirements, for the M & E System, and how the targeted results/outcomes will be accomplished through the combined efforts of the project team
- b. Review of the Project results framework and indicators
- c. Evaluation of the strengths and weaknesses of existing hardware and software technology and identify challenges encountered.
- d. Review of existing M & E tools, other data capture and reporting forms; and sampling methodology for the M & E system
- e. Undertake Information Technology Scoping
- f. M & E Framework Designing, Web applications build up for the enhanced Project M & E systems and provide the systems "roadmap" (forms, and automation program, solutions, database security and integration of the CRFPS IS); development of CRFPS IS system plan
- g. Develop the IS Beta Version
- h. User acceptance (debugging)
- i. Enhance CRFPS IS Version 1
- j. Manage the CRFPS M & E systems installation
- k. Facilitate System Transfer and installation (Learning session with Regional and Provincial focal Point Persons). The engaged firm will be responsible in contracting for the lease of venue.
- l. Identifies and prioritizes project milestones based on project framework and enhance the existing M & E system to effectively track project performance towards the accomplishment of targeted results and outcomes;
- m. Continually coordinates with and apprises the BARBD for the undertaking, and arranges for a regular schedule for submitting updates on milestones for the revision of the existing M & E system's overhaul;
- n. Manages and supervises the overall effort, and submits requirements for the progressive accomplishment reports (reporting on the IS functionality and plans for improvement, if any);
- o. Prepare Operation manual and systems documentation to facilitate the transfer of the systems administration and management to BARBD; and
- p. Make other contingency arrangements or requirements as needed.

Below are the roles of the DAR-BARBD:

- a. Make available to the Consultant all relevant information and project documents for reference. All documents provided will remain the property of the DAR. The consultants shall warrant that the materials (e.g. Project program framework, progress reports, case studies, and field reports) will not be disclosed, in part or in full, to any entity and/or be used for any purposes other than what is covered under this TOR without written approval from DAR.



- b. Together with the MISS, work closely with the Consulting Firm to ensure that agreed deliverables and outputs in the TOR are delivered as scheduled.
- c. Facilitate administratively the conduct of related meetings and other similar activities, which is beyond the scope of the Consulting Firm.
- d. Review the outputs of the Consulting Firm and provide recommendations for improvement, if necessary.
- e. Endorse the outputs of the Consulting Firm to facilitate payment.

## **VII. ETHICAL STANDARDS AND INTELLECTUAL PROPERTY**

Ownership and copyright of all data, drafts and final products of this survey will be the sole and exclusive property of DAR and restricted for public use. The firm will submit all original documents, materials and data to DAR, in hard and electronic copy.

(SGD.)  
**ERIC M. AREVALO**  
OIC- Director IV, BARBD

(SGD.)  
**ARTEMIO L. DUMAOANG**  
OIC-Director IV, MISS

