

# **PHILIPPINE BIDDING DOCUMENTS**

## **PART I**

### **Procurement of Consulting Services for the**

### **“Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHR Anniversary”**

Government of the Republic of the Philippines

**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 Section II. Eligibility Documents of Part I; and Section II. Instructions to Bidders (ITB) and Section IV. General Conditions of Contract (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, Section III. Bid Data Sheet (BDS), and Section V. Special Conditions of Contract (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 Section VII. Bidding Forms 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*



The Government of Republic of the Philippines  
**PHILIPPINE COUNCIL FOR HEALTH RESEARCH & DEVELOPMENT**  
General Santos Ave., Bicutan, Taguig City

## **REQUEST FOR EXPRESSION OF INTEREST**

FOR THE

### ***Procurement of Consulting Services for the “Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHRD Anniversary”***

1. The Philippine Council for Health Research and Development (PCHRD), through the **General Appropriations Act (GAA2021)** intends to apply the sum of **Ten Million Pesos (PhP 10,000,000.00)** being the Approved Budget for the Contract (ABC) to payments under the contract for **PCHRD – PB – 2021 – 07**. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The PCHRD now calls for the submission of eligibility documents for the **Procurement of Consulting Services for the “Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHRD Anniversary”**. Eligibility documents of interested consultants must be duly received by the BAC Secretariat on or before **November 12, 2021 (Friday) 10:00AM**. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion. The opening of Eligibility Documents is on the same day at **10:30AM**.
3. Interested bidders may obtain further information from Philippine Council for Health Research and Development (PCHRD) and inspect the Bidding Documents at the address given below during weekdays, from 8:00AM to 4:00PM.
4. A complete set of Bidding Documents may be acquired by interested Bidders on **November 04, 2021 to December 01, 2021**.

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

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

Criteria	Score	Required Minimum Score
1. Applicable Experience of the Service Provider/Firm a. Company's work portfolio for similar projects in the last three years b. Customer Feedback / Customer Performance Evaluation Report	50	
2 Qualifications of Key Personnel a. Engagement in similar projects in the last two years b. Educational Background c. Work portfolio	30	
3. Current Capacity a. Number of other projects currently handled by key personnel b. Number of key personnel to be assigned to the project c. List of equipment and software	20	
<b>TOTAL SCORE</b>	<b>100%</b>	<b>70%</b>

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

6. Shortlisted Consultants may purchase the Bid Documents upon payment of the applicable fee, pursuant to the latest Guidelines issued by the GPPB, in the amount of **Ten Thousand Pesos (PhP 10,000.00)**.
7. Bidding will be conducted through open competitive bidding procedures using non-discretionary "pass/fail" criterion as specified in the 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 (QCBE) procedure**. Wherein the technical and financial proposal shall be given corresponding weight equivalent to **85% (technical) and 15% (financial)**.
9. The contract shall be completed within at least one (1) year and three (3) months upon signing/receipt of Contract.
10. The PCHRD 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:

**Mr. Cirio D. Pangan Jr.**

Secretariat, Bids and Awards Committee

Philippine Council for Health Research and Development

2nd Floor, PCHRD Saliksik Building, Sikap Street,

DOST Main Compound, Gen. Santos Ave., Bicutan, Taguig City

Email: [cdpangan@pchrd.dost.gov.ph](mailto:cdpangan@pchrd.dost.gov.ph)

Tel. Nos. (02) 8-837-7536 or (2) 8-837-7537 loc. 504 or 506

Fax No. (02) 8-837-7536 or (2) 8-837-2924

(sgd.)

**PAUL ERNEST N. DE LEON**

Chairperson, Bids and Awards Committee



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

## 1. Eligibility Criteria

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

## 2. Eligibility Requirements

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

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

Technical Documents

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

- (b) Class "B" Document –

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

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

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

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

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

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

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

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked "ORIGINAL – ELIGIBILITY DOCUMENTS". Each copy thereof shall be similarly sealed duly marking the envelopes as "COPY NO. \_\_\_ - ELIGIBILITY DOCUMENTS". These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
  - (c) contain the name of the contract to be bid in capital letters;
  - (d) bear the name and address of the prospective bidder in capital letters;

- (e) be addressed to the Procuring Entity's BAC specified in the **EDS**;
- (f) bear the specific identification of this Project indicated in the **EDS**; and
- (g) bear a warning "DO NOT OPEN BEFORE..." the date and time for the opening of eligibility documents, in accordance with Clause 5.

4.4 Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

## **5. Deadline for Submission of Eligibility Documents**

Eligibility documents must be received by the Procuring Entity's BAC at the address and on or before the date and time indicated in the Request for Expression of Interest and the **EDS**.

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

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

## **7. Modification and Withdrawal of Eligibility Documents**

7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as "ELIGIBILITY MODIFICATION" and stamped "received" by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.

7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.

7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach

and be stamped by the BAC before the deadline for submission and receipt of eligibility documents.

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

- 8.1. The BAC will open the envelopes containing the eligibility documents in the presence of the prospective bidders' representatives who choose to attend, at the time, on the date, and at the place specified in the **EDS**. The prospective bidders' representatives who are present shall sign a register evidencing their attendance.

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

- 8.2. Letters of withdrawal shall be read out and recorded during the opening of eligibility documents and the envelope containing the corresponding withdrawn eligibility documents shall be returned unopened to the withdrawing prospective bidder.

- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:

- (h) the name of the prospective bidder;
- (i) whether there is a modification or substitution; and
- (j) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

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

## **9. Short Listing of Consultants**

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.
- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

## **10. Protest Mechanism**

Decision of the Procuring Entity at any stage of the procurement process may be questioned in accordance with Section 55 of the IRR of RA 9184.

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



# Eligibility Data Sheet

Eligibility Documents	
1.2	<p>The Procuring Entity is Department of Science and Technology (DOST) – Philippine Council for Health Research and Development (PCHRD)</p> <p>The name of the project is <b>Consulting Services for the “Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHRD Anniversary”</b>.</p>
1.3	No further instructions.
2.1(a)(i)	PhilGEPS Platinum Certification of Membership
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within the period of three (3) years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	<p>Certificate of Completion or Acceptance or valid proof of final payment issued by the client in case of completed contracts. Notice of Award, Notice to Proceed or signed contracts issued by the client for on-going contracts and for contracts awarded but not yet started.</p> <p>Customer Feedback / Customer Performance Evaluation Report for Completed Projects</p>
2.1(a)(iii)	<p>All bidders are required to submit/provide proof/certificate of the following in their Eligibility Documents:</p> <ul style="list-style-type: none"> <li>• Professional Registration</li> <li>• Highest Educational Attainment</li> <li>• Trainings undertaken</li> </ul>
4.2	Each prospective bidder shall submit <b>one (1)</b> original and <b>two (2)</b> copies of its eligibility documents.
4.3(e)	<p>PCHRD Bids and Awards Committee            Philippine Council for Health Research and Development            PCHRD Saliksik Building, Sikap Street, DOST Main Compound,            Gen. Santos Ave., Bicutan, Taguig City</p>
4.3(f)	Procurement of Consulting Services for the “Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHRD Anniversary”.
5	<p>Bidders should submit their Eligibility Documents through:</p> <ol style="list-style-type: none"> <li>1. <b>Electronic Copy</b> – Password-protected Eligibility Documents must be emailed to <a href="mailto:cdpangan@pchrd.dost.gov.ph">cdpangan@pchrd.dost.gov.ph</a> on or before the submission due date. The passwords for accessing the file will be disclosed by the Bidders only during the actual bid opening which may be done in person or face-to-face through videoconferencing,</li> </ol>

	<p>webcasting or similar technology; <b>and</b></p> <p>2. <b>Hardcopy</b> should be submitted to the address given below on or before the submission due date.</p> <p>The address for submission of eligibility documents is:</p> <p>PCHRD Bids and Awards Committee Philippine Council for Health Research and Development PCHRD Saliksik Building, Sikap Street, DOST Main Compound, Gen. Santos Ave., Bicutan, Taguig City</p> <p>The deadline for submission of eligibility documents is:</p> <p><b>November 12, 2021 (Friday), 10:00AM</b></p>						
8.1	<p>Opening of eligibility documents is through videoconferencing, webcasting or similar technology.</p> <p>Bidders are advised to join the opening of eligibility documents via Zoom Cloud Meetings. The link for the opening of eligibility documents will be sent via email to all bidders who submitted their eligibility documents on time.</p> <p>The BAC shall open first the submitted Electronic copy and check the submitted documents for each bidder to ascertain if they are all present. Any missing required documents in the submitted electronic copy, BAC members will check the submitted hardcopy for the missing document.</p> <p>In this regard, bids that fail to include any requirement or are incomplete or patently insufficient shall be considered as “failed”. Otherwise, the BAC shall rate the said Eligibility envelope as “passed”.</p> <p>The date and time of opening of eligibility documents is:</p> <p><b>November 12, 2021 (Friday), 10:30AM</b></p>						
9.1	<p>Similar contracts shall refer to contracts with scope of works related to Managing of Scientific Conferences via Virtual.</p>						
9.2	<p>The criteria and rating system for short listing are:</p> <table border="1" data-bbox="421 1659 1353 1989"> <thead> <tr> <th data-bbox="421 1659 1027 1771">Criteria</th> <th data-bbox="1027 1659 1182 1771">Score</th> <th data-bbox="1182 1659 1353 1771">Required Minimum Score</th> </tr> </thead> <tbody> <tr> <td data-bbox="421 1771 1027 1989">           1. Applicable Experience of the Service Provider/Firm           <ul style="list-style-type: none"> <li>a. Company’s work portfolio for similar projects in the last three years</li> <li>b. Customer Feedback / Customer Performance Evaluation Report</li> </ul> </td> <td data-bbox="1027 1771 1182 1989">50</td> <td data-bbox="1182 1771 1353 1989"></td> </tr> </tbody> </table>	Criteria	Score	Required Minimum Score	1. Applicable Experience of the Service Provider/Firm <ul style="list-style-type: none"> <li>a. Company’s work portfolio for similar projects in the last three years</li> <li>b. Customer Feedback / Customer Performance Evaluation Report</li> </ul>	50	
Criteria	Score	Required Minimum Score					
1. Applicable Experience of the Service Provider/Firm <ul style="list-style-type: none"> <li>a. Company’s work portfolio for similar projects in the last three years</li> <li>b. Customer Feedback / Customer Performance Evaluation Report</li> </ul>	50						

	2 Qualifications of Key Personnel a. Engagement in similar projects in the last two years b. Educational Background c. Work portfolio	30	
	3. Current Capacity a. Number of other projects currently handled by key personnel b. Number of key personnel to be assigned to the project c. List of equipment and software	20	
	<b>TOTAL SCORE</b>	<b>100%</b>	<b>70%</b>
	The prospective Consultant(s) must pass the required minimum score of seventy percent (70%) to be shortlisted.		

# **TERMS OF REFERENCE (TOR)**

Outsourcing of Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHRD Anniversary

## TERMS OF REFERENCE

A. <b>Title:</b>	Outsourcing of Event Management Service for the Conduct of the 40th PCHRD Anniversary
B. <b>Type of Services/Product:</b>	Event Organizing and Virtual Platform Development
C. <b>Client/Recipient :</b>	DOST - PCHRD

### D. Completeness of the Elements of Terms of Reference

#### I. Background and Rationale:

The Philippine Council for Health Research and Development (PCHRD) was created on March 17, 1982 through Executive order No. 784. In 1987, Executive Order No. 128 reaffirmed its existence and relevance. The Council is a partnership-based national body responsible for coordinating and monitoring research activities in the country.

PCHRD will celebrate its 40th Anniversary on March 17, 2022 with the theme, “PCHRD@40 and beyond: Transforming lives through health R and D”. In this connection, a series of activities will be conducted leading to the celebration:

- Awards and Recognition
- Talkshow: Launching of PCHRD programs and services
- MoU signing Ceremonies
- Plenary and Parallel sessions
- Press Conferences
- Capacity Building Activities

This is the first time that the Council will hold a year-long anniversary celebration. Thus, for the execution of these activities, PCHRD seeks to commission an experienced professional events management agency and virtual platform developer that will help conceptualize, design, execute, and implement an event plan.

Moreover, the challenges posed by CoViD-19 on how we conduct traditional scientific conferences and similar activities have urged us to look for strategies that will provide the same experience to our stakeholders. The expertise of a professional events management agency and virtual platform developer in bringing a traditional conference in a hybrid event environment will provide the Council the necessary tools that can support highly interactive, multi-session digital experiences and include an online agenda, a registration system, video delivery, speaker management, community networking and sponsorship opportunities.

#### II. Description of Consulting Services

The Professional Events Management Agency and Virtual Platform Developer shall co-develop and execute the overall plan for the successful conduct of the PCHRD 40th Anniversary Celebration and related activities.

**Main Objective:** This project aims to produce and implement a hybrid event plan for the successful conduct of the PCHRD 40th Anniversary activities that will run for 1 year and 3 months.

## Specific Objectives:

1. To showcase the accomplishments of PCHRD for the past 40 years via hybrid conference and promote the Council's programs and services to stakeholders such as policymakers, industry, research institutions, among others;
2. To provide a venue for conversation for the past and present health research stakeholders and partners to discuss the present and future of health research and development;
3. To get feedback on the current programs and services of the Council and use it as bases for improvement;
4. To launch new programs and services; and
5. To recognize partners (including present and previous PCHRD employees) in health research.

## III. Scope of Services

A. Submit the overall event plan which includes the following items:

1. Develop a brand for the event.
  - Develop a logo and an event's page as part of the branding
  - Conceptualize and procure souvenir materials for the event
2. Provide a virtual event platform with the following features:
  - **Lobby and Reception** (provide participant count on a specific day, showcase sponsor/partners, helpdesk, customizable background/layout)
  - **Conference Hall** (hold simultaneous sessions, stream via social media, accommodate pre-recorded/live streaming presentations, can interact/chat with other online participants/speakers, speakers, can share material/presentations, can facilitate question and answer/poll, customizable background/layout)
  - **Exhibit Area / Networking** (can mimic a modern exhibit experience, can be used for networking/ virtual meetups / speed dating, and allow user reactions through emojis, etc.)
  - **Analytics** (can generate post event analytics)
  - **Event Recording and Accessibility** (provide access to event video recordings to anyone until the completion of the project in the PCHRD website/platform)
  - **Other features** (navigation tutorial, fully customizable, with log-in, networking lounge, mosaic gallery, my schedule tab/assistant, booths search, points earning, commitment wall, can interact/chat with other online participants/speakers)
3. Develop a feature that will allow access to video recordings of activities for the period of 1 year and 3 months using the virtual platform
4. Allow PCHRD to use the virtual event platform for other anniversary related activities until the completion of the project.
5. Provide a registration system for the event (virtual platform and technical sessions) and can generate analytics for each session and entirety of the event.
6. Provide an invitation system for the invitees (can send invitation and other attachments such as program, reminders to participants and resource persons, and generate report/monitoring sheet on the status of invitees)
7. Co-develop and execute the implementation of the following sessions/ activities:

Activities	Requirements
<p>PCHRD Kick-off event (January)</p> <p>Mode: Hybrid</p>	<ul style="list-style-type: none"> <li>• Coordinate closely with the assigned session manager of the event</li> <li>• Invite celebrity emcee (options: Connie Sison, Jing Castaneda, Sheryl Cosim, Carl Balita, Gel Miranda, Dr. Richard Burgos, Chris Tiu, and Hannah Arnold)</li> <li>• Develop the running script and moderator guide</li> <li>• Conduct of dry run</li> <li>• Draft invitation letter</li> <li>• Produce videos for the event (National Anthem, Invocation, Welcome Remarks, 4 Division Performances, 40th Anniversary Teaser Video)</li> <li>• For the division performance:</li> <li>• Designate Art/Creative Director, videographer and editor for the Division Performances</li> <li>• Provide costumes as necessary</li> <li>• Provide sound system, stage or venue for the division performance recording</li> <li>• Provide overall support in the production of video for the division performances</li> <li>• Send event evaluation forms to attendees</li> <li>• Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>• Organize and deploy ushering team in the venue</li> <li>• Facilitate the streaming of the onsite event in the virtual platform</li> <li>• Manage all the activities on the day of the event</li> </ul>
<p>Jose Rizal Celebration (January)</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Coordinate closely with the assigned session manager of the event</li> <li>• Conceptualize/develop the program, script, and program guide</li> <li>• Conduct of dry run</li> <li>• Invite resource persons and participants</li> <li>• Arrange Virtual exhibit</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>MD–PhD Colloquium (January 20-21)</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Coordinate closely with the assigned session manager of the event</li> <li>• Conceptualize/develop the program, script, and program guide</li> <li>• Produce the following videos</li> <li>• about MD-PhD program</li> </ul>

	<ul style="list-style-type: none"> <li>• Send event evaluation forms to attendees</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>PCHRD Programs and Services Clinic (January)</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Disseminate clinic activity (mechanics)</li> <li>• Registration/screening of clinic participants</li> <li>• Develop schedule of clinic activities</li> <li>• Produce videos</li> </ul>
<p>Recognizing People of Health Research (February)</p> <p>a. Recognition of Consultants b. Honoring of PCHRD Officials and Staff c. Recognition of Media Partners</p> <p>Mode: Hybrid Onsite capacity: subject to IATF guidelines</p>	<ul style="list-style-type: none"> <li>• Coordinate closely with the assigned session manager</li> <li>• Invite emcee, media partners, and awardees</li> <li>• Develop the program</li> <li>• Produce videos</li> <li>• Send certificates/tokens to awardees and resource persons</li> <li>• Invite performers</li> <li>• Produce photo and video documentation on the conduct of activities</li> <li>• Send event evaluation forms to attendees</li> <li>• Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>• Organize and deploy ushering team in the venue</li> <li>• Facilitate the streaming of the onsite event in the virtual platform</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>PCHRD Thanksgiving (February)</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Invite emcee</li> <li>• Develop the program and script</li> <li>• Invite performers</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>Graduation Ceremony (February)</p> <p>a. UPSCALE Program Graduation b. MD PhD Graduation</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Coordinate closely with the assigned session manager of the event</li> <li>• Conceptualize/develop the program, script, and program guide</li> <li>• Produce the following videos</li> <li>• UPSCALE Program</li> <li>• Testimonial from Scholars</li> <li>• Send event evaluation forms to attendees</li> <li>• Manage all the activities on the day/s of the event</li> </ul>



<p>Project Graduation Ceremony February</p> <p>RDMD Projects completed in 2019-2021 February</p> <p>RRF - subject to review</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Coordinate closely with the assigned session manager of the event</li> <li>• Invite emcee, participants, and resource persons</li> <li>• Develop script</li> <li>• Engage participants through a game, poll, etc.</li> <li>• Conduct of dry run</li> <li>• Produce videos (Welcome Remarks, Message from the Secretary, Closing Remarks, 12 Videos for Completed Projects (One per priority area), 3 for RRF Projects, Duration: max 5 minutes each, 1 R and D Grant Service video</li> <li>• Develop and send certificates of completion, appreciation to awardees and resource persons</li> <li>• Send event evaluation forms to attendees</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>Talkshow: Launching of PCHRD Programs and Services (March 14)</p> <p>a. Tuklas Lunas Book of Accomplishments b. Ethical Guidelines New Edition c. TKDL Website d. Epidemiology Fellowship Program</p> <p>Mode: Hybrid</p>	<ul style="list-style-type: none"> <li>• Produce video</li> <li>• Develop program and script</li> <li>• Send invitation to emcee, interviewees</li> <li>• Prepare and distribute certificates and tokens</li> <li>• Produce photo and video documentation</li> <li>• Create online poster</li> <li>• Send event evaluation forms to attendees</li> <li>• Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>• Organize and deploy ushering team in the venue</li> <li>• Facilitate the streaming of the onsite event in the virtual platform</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>MoA / MoU signing (March 15)</p> <p>a. HERDIN PLUS MoU ceremonial signing b. Philippine Biomedical Device Innovation Consortium (PBDIC) MoU signing</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Develop the program and script</li> <li>• Produce consortium video briefer (PBDIC) and HERDIN PLUS MoU video briefer</li> <li>• Send invitation to attendees</li> <li>• Prepare and distribute certificates and tokens</li> <li>• Produce photo and video documentation</li> <li>• Send event evaluation forms to attendees</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>Opening Ceremonies (March 17, 2022)</p> <p>Mode: Hybrid</p>	<ul style="list-style-type: none"> <li>• Develop the program, script, and program guide</li> <li>• Send invitation to participants and resource persons</li> <li>• Produce the following videos:</li> </ul>

	<ol style="list-style-type: none"><li>1. PCHRD Accomplishments for the past 40 years</li><li>2. 40th Anniversary past activities</li><li>3. PCHRD Hymn and a jingle</li><li>4. National Anthem and Prayer (PCHRD-inspired)</li></ol> <ul style="list-style-type: none"><li>● Briefs and assists resource persons based on the guide prepared</li><li>● Coordinates with program/session manager on the submission of papers, speeches and other related materials</li><li>● Facilitates the recording of the resource speaker's presentation</li><li>● Prepares orientation materials for resource persons</li><li>● Orients resource persons prior to the activity</li><li>● Prepare and distribute certificates, tokens, and kits</li><li>● Produce photo and video documentation</li><li>● Send event evaluation forms to attendees</li><li>● Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li><li>● Organize and deploy ushering team in the venue</li><li>● Facilitate the streaming of the onsite event in the virtual platform</li><li>● Manage all the activities on the day/s of the event</li></ul>
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<p>Awarding/Recognition Ceremonies</p> <p>a. Best Mentor in Health Research Award b. Epidemiology Fellowship c. Newly Accredited Research Ethics Committee</p> <p>Mode: Hybrid</p>	<ul style="list-style-type: none"> <li>● Identify host/emcee for awarding ceremonies</li> <li>● Develop the program, script, and program guide</li> <li>● Send invitation to attendees</li> <li>● Prepare and distribute certificates, tokens, and kits</li> <li>● Produce photo and video documentation</li> <li>● Send event evaluation forms to attendees</li> <li>● Manage all the activities on the day/s of the event</li> <li>● Prepare plaques and certificates</li> <li>● Prepare big cheques</li> <li>● Develop the program and script for awarding ceremonies (present winners, and corresponding plaques/certs)</li> <li>● Produce videos</li> </ul> <ol style="list-style-type: none"> <li>1. AVP for background on Best Mentor in Health Research Award (max 3 minutes)</li> <li>2. AVP for 4 cluster winners - Luzon, Visayas, Mindanao, and NCR (2-3 minutes per cluster winner)</li> <li>3. AVP for 1 national winner (2-3 minutes)</li> <li>4. Epidemiology Fellowship</li> <li>5. Newly Accredited Research Ethics Committee</li> </ol> <ul style="list-style-type: none"> <li>● Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>● Organize and deploy ushering team in the venue</li> <li>● Facilitate the streaming of the onsite event in the virtual platform</li> </ul>
<p>Announcement of Contest Winners</p> <p>Mode: Hybrid</p>	<ul style="list-style-type: none"> <li>● Identify host/emcee</li> <li>● Develop the program and script</li> <li>● Prepare and distribute certificates, tokens, and kits</li> <li>● Produce photo and video documentation</li> <li>● Manage all the activities on the day/s of the event</li> <li>● Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>● Organize and deploy ushering team in the venue</li> <li>● Facilitate the streaming of the onsite event in the virtual platform</li> </ul>
<p>Plenary Session 1: <b>Panel Discussion: Futures of Health Research in a changing world (Tentative)</b></p>	<ul style="list-style-type: none"> <li>● Invite panelists, speakers, and moderator Proposed Moderator (USec. Rowena Guevara)</li> <li>● Develop the program, script, and program guide</li> </ul>

<p>Mode: Hybrid</p>	<ul style="list-style-type: none"> <li>• Prepare and distribute certificates, tokens, and kits</li> <li>• Produce photo and video documentation</li> <li>• Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>• Organize and deploy ushering team in the venue</li> <li>• Facilitate the streaming of the onsite event in the virtual platform</li> </ul>
<p><b>Parallel Session 1</b> Training and Workforces for the Future</p> <p><b>Parallel Session 2</b> Research Investment: Learning from the pandemic and getting ready for the next one</p> <p><b>Parallel Session 3</b> Moving Forward: A Vision for the Future and Research Agenda</p> <p><b>Parallel Session 4:</b> Research Utilization in the next decade</p> <p><b>Parallel Session 5:</b> Research Ethics: Evolving Role and Emerging Trends</p> <p>Mode: Hybrid</p>	<ul style="list-style-type: none"> <li>• Send invitation to participants and resource persons</li> <li>• Briefs and assists resource persons based on the guide prepared</li> <li>• Coordinates with program/session manager on the submission of papers, speeches and other related materials</li> <li>• Facilitates the recording of the resource speaker's presentation</li> <li>• Prepares orientation materials for resource persons</li> <li>• Orients resource persons prior to the activity</li> <li>• Produce photo and video documentation</li> <li>• Send event evaluation forms to attendees</li> <li>• Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>• Organize and deploy ushering team in the venue</li> <li>• Facilitate the streaming of the onsite event in the virtual platform</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>Press Conferences</p> <p>Mode: Hybrid</p> <p>Note: Media will attend virtually</p>	<ul style="list-style-type: none"> <li>• Invite media, resource persons, emcee/moderator</li> <li>• Prepare and distribute media kit</li> <li>• Produce videos</li> <li>• Produce photo and video documentation</li> <li>• Arrange physical setup including sourcing of equipment (LED, projector, laptops, pointer, internet connection, sound system, etc.)</li> <li>• Organize and deploy ushering team in the venue</li> <li>• Facilitate the streaming of the onsite event in the virtual platform</li> <li>• Manage all the activities on the day/s of the event</li> </ul>
<p>40 Bests of PCHRD</p> <p>Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Conceptualize and produce 30s - 60s videos</li> <li>• Gather data and photo or clips as needed on the 40 topic identified</li> <li>• Ensure videos are played in selected platform</li> <li>• Provide technical support</li> </ul>

<p>Greetings from policymakers and personalities Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Produce videos</li> <li>• Ensure videos are played in selected platform</li> <li>• Provide technical support</li> <li>• Proposed: Chris Tiu ,Hannah Arnold</li> <li>• Kim Atienza , Jeffrey Hidalgo , Bam Aquino</li> </ul>
<p>Exhibit Mode: Virtual</p>	<ul style="list-style-type: none"> <li>• Develops and implements exhibits committee plan</li> <li>• Invite exhibitors</li> <li>• Manages the exhibits</li> <li>• Conduct orientation for exhibitors if necessary</li> <li>• Disseminates activity in owned media platforms</li> <li>• Provide technical support</li> </ul>

6. Facilitate the design, development, and procurement of anniversary collaterals as follows: Program book, tokens, kits, virtual background, photo booth, event certificates, 30s to 60s video teasers, save the dates teasers
7. Develops and implements reception plan
8. Develops and implements documentation plan (e.g. written, photo, video, etc.)
  - Documents proceedings and comes up with an Event Report with evaluation
  - Ensure video recording of the whole engagement and submission of all the recordings to PCHRD
  - Ensures immediate completion of proceedings of the event, in digital form one month after, and in print as necessary.
  - 9. Develops and implements technical support plan
  - Coordinates with venue personnel and ensures proper installation of ICT technology for the conduct of the anniversary celebration
  - Coordinates with network partners, if needed
  - Provide ICT technical support to staff, participants, resource persons relevant to the conduct of the events

B. Once selected, conduct a startup discussion with PCHRD to discuss the event activities;

C. Prepare an Inception Report that will include the events plan and timeline with the following minimum requirements:

- Background of the project
- Objectives
- Implementation
- Strategy/project methodology
- Schedule of activities/timeline
- Budget plan
- Composition of project team

D. Provide regular updates to PCHRD on the status of the project;

E. Submit all required deliverables on the agreed timeline.

#### **IV. Responsibilities of the Service Provider**

The responsibilities of the service provider include but not limited to:

1. Coordinate closely with PCHRD throughout the duration of the engagement.
2. Provide monthly updates to PCHRD on the progress of work.
3. Abide by all the terms and conditions stipulated in this engagement. The service provider shall report directly to the person-in-charge of the project to approve notices and

- deliverables based on TOR, activities, and other related tasks.
4. Turnover equipment and gadgets procured under this agreement to DOST-PCHRDR.
  5. Seek coordination and consultation with DOST-PCHRDR during planning/ development, implementation and finalization/completion of project activities.
  6. Be responsible for the timely provision of all outputs and conduct of activities that are necessary within the time schedule/ implementation schedule agreed upon. Fulfill all the requirements and deliverables of the project.
  7. Coordinate with PCHRDR for directions and requirements in the project implementation.
  8. Call for meetings with PCHRDR whenever deemed necessary.

## **V. Data and services to be provided by PCHRDR**

The responsibilities of PCHRDR include but not limited to:

1. Exercise supervision of the project. This includes the provision of technical assistance, suggestions on improvements on plans, scripts, and guides.
2. Assume primary responsibility for the acceptance of the project deliverables.
3. Make prompt reviews and recommendations for revisions of the work produced and presented by the service provider/supplier in the different phases of the work/services.

## **VI. Deliverables**

The service provider shall prepare and submit the following:

1. **Proposal.** The service provider shall prepare a detailed proposal which will serve as an inception report with the following minimum requirements:
  - Background of the project
  - Objectives
  - Implementation
  - Strategy/project methodology
  - Schedule of activities/timeline
  - Budget plan
  - Composition of project team (must include CVs)
2. **Progress Report.** The service provider shall prepare and submit the following documents to be able to monitor the progress of the engagement:
3. **Event Plan.** This contains the overall strategy to be implemented for the engagement including the resources needed (line-item budget).
4. **Milestones Report.** This will depend on the approved timeline that will cover updates on materials development and implementation of the activities as scheduled.
5. **Evaluation Report.** This report contains the post-event report which includes the assessment of the methods, customer feedback, and outputs of the event.

## **VII. Project Duration**

The service provider will be engaged in the Project for 1 year and 3 months.

## **VIII. Approved Budget for the Contract**

The consulting service for the Project has an Approved Budget for the Contract (ABC) of Ten Million Pesos (Php 10,000,000.00), inclusive of applicable taxes and fees.

## IX. Mode of Payment

In consideration of the services required under this TOR, the proposed payment scheme for the project will be billed progressively upon completion of the following milestones:

Upon submission and acceptance of the Inception Report	15%
Upon approval of overall event plan	40%
After implementation of the Anniversary Main event	25%
Upon acceptance of the Evaluation and Terminal Report	20%

## X. Qualification of the Service Provider

Prospective Service Provider must meet the following minimum requirements in order to be considered for selection:

- Must have completed at least two (2) contracts for the last three (3) years similar to this project in terms of scope and budget;
- For this purpose, similar contracts refer to managing of scientific conferences via virtual
- With good track record and extensive experience with various clients;
- Full Disclosure of in-house services vs. outsourced services that will be provided during the course of engagement
- Has enough number of personnel and has the needed equipment including software, and is capable to meet the needed requirements;

## XI. Shortlisting of Prospective Bidders

Qualified service provider must submit the following:

- Company's Work Portfolio - list and description of recent similar undertakings (with links to online published work if available).
- Customer Satisfaction Rating – feedback form, performance evaluation, or customers' feedback on similar undertakings
- Personal Curriculum Vitae of the Main Consultant and Key Personnel; include the number of on-going projects handled by each personnel

Criteria	Weight
Applicable Experience of the Service Provider/Firm <ul style="list-style-type: none"><li>• Company's work portfolio for similar projects in the last three years</li><li>• Customer Feedback / Customer Performance Evaluation Report</li></ul>	50%
Qualifications of Key Personnel <ul style="list-style-type: none"><li>• Engagement in similar projects in the last two years</li><li>• Educational Background</li><li>• Work portfolio</li></ul>	30%
Current Capacity <ul style="list-style-type: none"><li>• Number of other projects currently handled by key personnel</li></ul>	20%

<ul style="list-style-type: none"> <li>• Number of key personnel to be assigned to the project</li> <li>• List of equipment and software</li> </ul>	
Total	100%

Prospective bidders must pass the required minimum score of 70% to be shortlisted. Failure of the Service Provider to meet the specified requirements would result in a zero (0) rating for the specific criterion.

## **XII. Determination of the Highest Rated Bid (HRB)**

Shortlisted bidders shall be evaluated to determine the bidder with the HRB, wherein the criteria shall be as follows:

<b>Criteria</b>	<b>Weight</b>
Experience of Service Provider/ Firm <ul style="list-style-type: none"> <li>• Company's work portfolio in similar projects in the last two years</li> <li>• Customer Feedback / Performance Evaluation Report</li> </ul>	30%
Qualifications of Key Personnel <ul style="list-style-type: none"> <li>• Engagement in similar projects in the last two years</li> <li>• Educational Background</li> <li>• Work portfolio</li> </ul>	30%
Methodology and Timeline <ul style="list-style-type: none"> <li>• Clarity, feasibility, innovativeness, and comprehensiveness of the plan approach</li> <li>• Event plan satisfies the TOR</li> <li>• Clear and specific timeline of activities in 1 year and 3 months project duration</li> </ul>	40%
Total	100%

To be declared as HRB, the bidder shall pass the required minimum technical score of seventy percent (70%). Failure of the Service Provider to meet the specified requirements would result in a zero (0) rating for the specific criterion.

## **XIII. Evaluation Procedure**

In order to determine the Service Provider with the HRB, PCHRD shall conduct an evaluation of bids using the Quality-Cost Based Evaluation (QCBE) Procedure wherein the technical and financial proposal shall be given corresponding weight equivalent of 85% (technical) and 15% (financial).

## **XIV. Manning Requirement**

The Service Provider shall form a team of qualified, experienced, physically and mentally fit key



personnel, specialists, support and administrative staff (not necessarily limited to those listed below) with satisfactory experience in similar projects.

Key Personnel	Qty	Qualifications
Main Consultant / Project Manager	1	<ul style="list-style-type: none"> <li>• Must possess at least a Bachelor's Degree in Marketing/ Advertising and related courses</li> <li>• At least 5 events for the last 3 years working experience gained as a lead in events management and coordination for scientific events</li> </ul>
Writer	3	<ul style="list-style-type: none"> <li>• Must possess at least a Bachelor's Degree in Communication, Marketing and related courses</li> <li>• At least 2 years of working experience gained in events management and coordination</li> </ul>
Project Assistants	5	<ul style="list-style-type: none"> <li>• Must possess at least a Bachelor's Degree</li> <li>• At least 2 years of working experience gained in events management and coordination</li> </ul>
Virtual Platform Developer	at least 2	<ul style="list-style-type: none"> <li>• Must possess at least a Bachelor's Degree related to ICT</li> <li>• At least 2 years of working experience gained in developing virtual platform</li> </ul>

Graphic Artists/ Graphic Designers	At least 2	<ul style="list-style-type: none"> <li>• Highly proficient in Adobe creative suite applications and related tools</li> <li>• Must have demonstrable graphic design skills with good portfolio</li> <li>• Strong eye for visual composition and elements of design</li> <li>• Preferably familiar with basic programming skills</li> </ul>
Videographers/Photographers	at least 5	<ul style="list-style-type: none"> <li>• Knowledge on operating and handling audio/video</li> <li>• Must have portfolio of past video production work</li> </ul>
Video editor	at least 2	<ul style="list-style-type: none"> <li>• Highly proficient in video and editing soft wares, animation soft wares, and related tools.</li> <li>• Must have portfolio of past video editing work</li> </ul>

## XV. Performance Security

1. To guarantee the faithful performance by the winning service provider of its obligations under the Contract, it shall post a performance security within a maximum period of ten (10) calendar days from the receipt of the Notice of Award from PCHR and in no case later than the signing of the Contract.
2. Performance security shall be denominated in Philippine Pesos and posted in favor of PCHR in an amount equal to the percentage of the total contract price in accordance with the following schedule:

Form of Performance Security	Amount of Performance Security (Not less than the Percentage of the Total Contract Price)
a. Cash or cashier's/manager's check issued by a Universal or	Five percent (5%)

<p>Commercial Bank</p> <p>b. Bank draft/guarantee or irrevocable letter of credit issued by a Universal or Commercial Bank: Provided, however, that it shall be confirmed or authenticated by a Universal or Commercial Bank, if issued by a foreign bank; and/or</p>	
<p>c. Surety bond callable on demand issued by a surety or insurance company duly certified by the Insurance Commission as authorized to issue such security.</p>	<p>Thirty percent (30%)</p>

3. The Performance Security shall be forfeited in favor of PCHRD should the Service Provider fail to fulfil any of its obligations under this TOR or the Contract. Additional penalties may be imposed upon the Service Provider for such failure.

#### **XVI. Standard of Services**

The Service Provider shall fulfill its obligations under the agreement by using its technical expertise and according to the best-accepted professional and industry standards. The Service Provider shall exercise all reasonable skill, care, diligence, and prudence in the discharge of the duties agreed to be performed and shall always work in the best interest of PCHRD. To attain these, the Service Provider shall provide personnel with sufficient qualifications and experience to ensure the full and satisfactory accomplishment of the required services/undertakings.

The services shall be conducted by the Service Provider in accordance with the instructions or directions made or to be made by PCHRD at any time before its completion. The Service Provider shall conduct regular consultation with PCHRD in relation to the undertaking of its responsibilities under the Contract of Service.

#### **XVII. General Terms and Conditions**

- A. Intellectual Property and Ownership of Project Output
 

All materials developed and produced for the project shall be submitted to the PCHRD, and that the PCHRD has all perpetual rights to the finished products, including all the master copies and raw materials used to produce the finished products.
- B. Confidentiality
 

Except with the prior Consent of PCHRD, the Service Provider or its Principals and Staff shall not at any time communicate to any persons or entity any information disclosed to them by PCHRD for the purposes of this Project, nor shall the Service Provider or its Principals and Staff make public any information as to the recommendations formulated in the course of or as a result of the Project.

C. Third Party Participation

Any activity in the course of the implementation of the Project assigned to or contributed by third parties including, but not limited to use of materials/samples, collaborative research, or use of facilities should be disclosed by the Service Provider to PCHRD prior to engaging in said activity. Any agreement entered into by the Service Provider without prior consent of PCHRD will not be binding on the latter insofar as confidentiality, treatment, ownership, enforcement and disposition of intellectual property rights resulting from said activity is concerned. The PCHRD reserves the right to withhold consent to such agreement upon determination that it is not to the best interest of the herein Parties or gives undue advantage to said parties and for similar causes.


Prepared by:

  
**Maria Violeta G. Intia**  
Senior SRS

Noted by:

  
**Ulyann C. Garcia**  
OIC, RICUD

Approved by:

  
**Jaime C. Montoya, MD, MSc, PhD, CESO II**  
Executive Director III

# **ELIGIBILITY FORMS**

## EF1. ELIGIBILITY DOCUMENTS SUBMISSION FORM

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[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated [insert date] for [Title of Project], [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, LGUs, or autonomous regional government, including foreign government/foreign or international financing institution; 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 short listed or not.

We further acknowledge that failure to sign this Eligibility Document Submission Form shall be a ground for our disqualification.

Yours sincerely,

Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address

**EF2. STATEMENT OF ALL ON-GOING AND COMPLETED GOVERNMENT AND PRIVATE CONTRACTS, INCLUDING CONTRACTS AWARDED BUT NOT YET STARTED**

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*[Letterhead]*

*[Date]*

*[Name and address of the Procuring Entity]*

Ladies/Gentlemen:

In compliance with the eligibility of the Bids and Awards Committee of the Philippine Council for Health Research and Development for the bidding of Consulting Services for the “Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHRD Anniversary”, we certify that *[name of the bidding firm]* has *[state applicable statement:: on-going and completed government and private contracts, including contracts awarded but not yet started]*, as enumerated in EF 3. Summary of Projects.

Sincerely,

Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address

**EF 3A. SUMMARY OF ALL COMPLETED GOVERNMENT AND PRIVATE CONTRACTS**

Project No. <sup>1</sup>	Project Name & Location	Project Description	Type of Consulting Service	Contract Amount <sup>2</sup>	If JV Partner, Contract amount for Consultant's Involvement (if applicable)	Part of Contract Amount for Consultant's Involvement in "Managing of Scientific Conferences via Virtual" (if applicable) <sup>3</sup>	Date of Contract Awarded	Contract Period <sup>4</sup>	Proof of Undertakings <sup>5</sup>

Certified by:

*[Signature over printed name of Authorized Representative]*

*[Name of the Bidding Firm]*

<sup>1</sup> Indicate Project No. as shown in EF 4. Consultant's References.

<sup>2</sup> In Philippine Peso.

<sup>3</sup> If Consulting services for the " Managing of Scientific Conferences via Virtual " is just part of the required services of the contract, state how much for JVAs, state how much is the subcontracted amount allocated for consulting services for this contract, in Philippine Peso.

<sup>4</sup> State the start and completion dates of the contract.

<sup>5</sup> Contract; Certificate of Completion or Acceptance or valid proof of final payment issued by the client in case of completed contracts; and Customer Feedback / Customer Performance Evaluation Report for Completed Projects. Notice of Award or Notice to Proceed or signed contracts for on-going contracts and for contracts awarded but not yet started



**EF 3B. SUMMARY OF ALL ON-GOING GOVERNMENT AND PRIVATE CONTRACTS INCLUDING CONTRACTS  
AWARDED BUT NOT YET STARTED**

Project No. <sup>1</sup>	Project Name & Location	Project Description	Type of Consulting Service	Contract Amount <sup>2</sup>	If JV Partner, Contract amount for Consultant's Involvement (if applicable)	Part of Contract Amount for Consultant's Involvement in "Managing of Scientific Conferences via Virtual" (if applicable) <sup>3</sup>	Date of Contract Awarded	Contract Period <sup>4</sup>	Proof of Undertakings <sup>5</sup>

Certified by:

*[Signature over printed name of Authorized Representative]  
[Name of the Bidding Firm]*

<sup>1</sup> Indicate Project No. as shown in EF 4. Consultant's References.

<sup>2</sup> In Philippine Peso.

<sup>3</sup> If Consulting services for the "Managing of Scientific Conferences via Virtual" is just part of the required services of the contract, state how much for JVAs, state how much is the subcontracted amount allocated for consulting services for this contract, in Philippine Peso.

<sup>4</sup> State the start and completion dates of the contract.

<sup>5</sup> Contract; Certificate of Completion or Acceptance or valid proof of final payment issued by the client in case of completed contracts; and Customer Feedback / Customer Performance Evaluation Report for Completed Projects. Notice of Award or Notice to Proceed or signed contracts for on-going contracts and for contracts awarded but not yet started.

## EF 4. CONSULTANT'S REFERENCES

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### Relevant Services Carried Out That Best Illustrate Qualifications

*[Using the format below, provide information on each contract, whether similar or not similar in nature and complexity to the contract to bid, 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 No. *[State numerical order starting with number 1]*

Name of Contract:		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 the Project:
Start Date (Month/Year):	Completion Date (Month/Year)	Approx. Value of Services (in PhP)
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: \_\_\_\_\_

<p><b>Important Note:</b> Applicable supporting documents to substantiate undertaking shall be provided during the submission of Technical Proposal. Only those contracts with supporting documents will be considered for evaluation.</p>
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**EF 5. SUMMARY OF CVS**

No.	Name of Key Staff	Nominated Position	Registered Profession <sup>1</sup>	Highest Educational Attainment <sup>2</sup>	No. of Trainings Relevant to Profession <sup>3</sup>		Over-all Work Experience <sup>4</sup>	Number of Projects Undertaken Related to the "Managing of Scientific Conferences via Virtual"
					Local	Foreign		
1								
2								
3								
4								
5								

Certified by:

*[Signature over printed name of Authorized Representative]*

*[Name of the Bidding Firm]*

<sup>1</sup> Provide proof of professional registration

<sup>2</sup> Provide proof of highest educational attainment

<sup>3</sup> Provide proof of trainings undertaken

<sup>4</sup> State total number of years for work experience

**EF 6. FORMAT OF CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF (KEY PERSONNEL)**

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

Name of Firm: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Registered Profession: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Nationality: \_\_\_\_\_

Years with Firm: \_\_\_\_\_ Current Position in the Firm: \_\_\_\_\_

**Education**

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

College/University	Degree/Title Obtained	Inclusive Dates

**Training/Seminars**

*[Summarize the trainings, seminars and workshops undertaken, including those conducted by the nominated key staff, using the matrix below. Continue on separate sheet, if necessary.]*

Title/Description	Conducted by	Inclusive Dates	Venue	Involvement*

\*Such as Participant, Speaker or Trainer

**Completed projects similar in nature with the PCHRD Requirement**

*[Similar projects refer to the projects with scope of works related to Managing of Scientific Conferences via Virtual. Provide outline of projects legally contracted within the period of three (3) years, using the matrix below]*

Title/Description	Client	Position	Completion Date	Nature of services rendered related to his/her function in the PCHRD Project

**Ongoing Projects**

*[Provide outline of ongoing projects using the matrix below]*

Title/Description	Client	Position	Start Date	End Date

**Memberships in Professional Societies**

*[Give an outline of memberships in professional societies using the matrix below]*

Name of Society/Commission	Date of Conferment/Registration	License/Professional Number	Validity Date

**Languages**

*[Using the format below, indicate proficiency of languages familiar with proficiency whether excellent, good, fair, or poor in speaking, reading, and writing.]*

Language	Proficiency		
	Speaking	Reading	Writing

**Employment Record:**

*[Starting with present position, list in reverse order every employment held by nominated staff. List all positions since graduation, giving dates, names of employing organizations, titles of positions held, and description of projects. Indicate relevant work experience of staff in his/her nominated position. Continue on separate sheet if necessary.]*

Employing Organization	Position Held	Description of Project	Start Date	End Date

**Certification:**

I, *[full name of proposed professional staff]*, certify that to the best of my knowledge and belief, these data correctly described me, my qualifications, and my experience.

I further commit that I shall work for the Consulting Services for the “Event Management Service and Virtual Platform Developer for the Conduct of the year-long celebration of the 40th PCHRD Anniversary” as *[nominated position]* of *[name of bidding firm]* once awarded the contract.

*[Signature over printed name of nominated key staff]*

Date:

*[Signature over printed name of authorized representative of the firm]*

Date:

<p><b>Important Note:</b> Applicable documents to substantiate professional registration, educational attainment and trainings undertaken shall be provided during the submission of Technical Proposal. Only those attainments and undertakings with supporting documents will be considered for evaluation.</p>
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**EF 7. STATEMENT OF CONSULTANT SPECIFYING ITS NATIONALITY AND  
CONFIRMING THAT THOSE WHO WILL ACTUALLY PERFORM THE SERVICES  
ARE REGISTERED PROFESSIONAL**

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*[Letterhead]*

*[Date]*

The Bids and Awards Committee  
Philippine Council for Health Research and Development  
PCHRD Saliksik Building, Sikap Street, DOST Main Compound,  
Gen. Santos Ave., Bicutan, Taguig City

Ladies/Gentlemen:

*[Name of Bidding Firm]* is issuing this statement in compliance with the requirements of the Philippine Council for Health Research and Development (PCHRD) Bids and Awards Committee, that the nationality of members of the project team are indicated below and that they can actually perform the service in accordance with the eligibility requirements.

Proposed Project Team for the project:

Name	Assignment	Nationality

*[Name of Bidding Firm]* issues this statement in accordance with clause 2.1 of the eligibility requirements for the project.

Sincerely,  
*[Signature over printed name of Authorized Signatory]*  
*[Title]*

## EF 8. FORMAT OF CURRICULUM VITAE (CV) OF THE FIRM

**Name of Firm:** \_\_\_\_\_

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

**No. of Years of Operation:** \_\_\_\_\_

**Years of Professional Experience:**           (in projects similar in nature with the PCHRD requirement)          

**Completed projects similar in nature with the PCHRD Requirement**

*[Provide list of projects similar in nature with the PCHRD requirement legally contracted within the period of three (3) years. Similar projects refer to the projects with scope of works related to Managing of Scientific Conferences via Virtual. Provide outline of projects undertaken using the matrix below.]*

Title/Description	Client	Inclusive Dates	Value of Contract	Nature of Services:

**Ongoing Projects**

*[List all projects similar in nature with the PCHRD requirement based on current contracts. Similar projects refer to the projects with scope of works related to Managing of Scientific Conferences via Virtual. Provide outline of projects undertaken using the matrix below.]*

Title/Description	Client	Inclusive Dates	Value of Contract	Nature of Services:

**Membership in Professional Societies (if applicable):**

Year	Professional Society



**Certification**

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe the firm, its qualifications and experiences.

\_\_\_\_\_  
Signature over printed name of Authorized Representative of the firm  
Date: \_\_\_\_\_

# **CHECKLIST OF REQUIREMENTS**

## CHECKLIST AND TABBING OF ELIGIBILITY REQUIREMENTS

Tab No.		Description
1	<b>EF 1</b>	Eligibility Submission Form
2		Platinum PhilGEPS Certificate of Registration (each member in case of JV or Consortium)
3	<b>EF 2</b>	Statement of all on-going and completed government and private contracts including contracts awarded but not yet started
4	<b>EF 3A</b>	Summary of all completed government and private contracts. Supported with: 1. Contract; 2. Certificate of Completion or Acceptance or valid proof of final payment issued by the client in case of completed contracts; 3. Customer Feedback / Customer Performance Evaluation Report for Completed Projects
	<b>EF 3B</b>	Summary of all on-going government and private contracts including contracts awarded but not yet started. Supported with: 1. Notice of Award; 2. Notice to Proceed or signed contracts for on-going contracts for contracts awarded but not yet started
5	<b>EF 4</b>	Consultant's References
6	<b>EF 5</b>	Summary of CVs
7	<b>EF 6</b>	Curriculum Vitae for each of the following nominated key staff (Please attach supporting documents, i.e. valid licenses/professional registrations, certificates of trainings attended, work experiences, highest educational attainment, and other supporting documents relative to credentials of proposed Professional Staff)
8	<b>EF 7</b>	Statement of Consultant Specifying its Nationality and Confirming that those who will Actually Perform the Services are Registered Professional authorized by the appropriate regulatory body to practice those professions and allied professions
9	<b>EF 8</b>	Curriculum Vitae of the Firm Supported with: 1. Company Profile (Background, Services Offered, etc.)
10		List of Consultant's major equipment units and software, which are owned, leased, and/or under purchase agreements, supported by proof of ownership, certification of availability of equipment from the equipment lessor/vendor for the duration of the project.
11		Audited Financial Statement, duly stamped "RECEIVED" by the BIR.

12		Valid joint venture agreement, in case a joint venture is in existence.
13		Supplemental Bid Bulletin, if any

**Note:** PCHRD shall not assume any responsibility regarding erroneous interpretations or conclusions by the Consultant out of the data furnished by PCHRD in relation to this bidding. The Consultant shall take the responsibility to ensure the completeness of its submission after taking the steps to carefully examine all of the Bidding Documents and its amendments.

**Reminder: ALL PAGES TO BE SIGNED BY BIDDER'S REPRESENTATIVE**

