



**Social Security System**

East Avenue, Diliman, Quezon City

# **PHILIPPINE BIDDING DOCUMENTS**

**Fifth Edition  
October 2016**

## **PART I PROCUREMENT OF CONSULTING SERVICES**

**ORGANIZATIONAL ASSESSMENT  
(HUMAN RESOURCE - ORGANIZATIONAL  
DEVELOPMENT CONSULTANCY FIRM  
FOR THE RESTRUCTURING PLAN OF THE  
SOCIAL SECURITY SYSTEM)**

**REI-SSS-CONSULTING-2021-010**

**Government of the Republic of the Philippines**

**JULY 2021**

A handwritten signature in black ink, appearing to read 'Nympha M. Ragel'.

**MA. NYMPHA M. RAGEL  
Chairperson, TWG**

# TABLE OF CONTENTS

## PART I

SECTION I. REQUEST FOR EXPRESSION OF INTEREST.....	3
SECTION II. ELIGIBILITY DOCUMENTS.....	6
SECTION III. ELIGIBILITY DATA SHEET.....	12

# *Section I. Request for Expression of Interest*



REPUBLIC OF THE PHILIPPINES  
**SOCIAL SECURITY SYSTEM**

East Avenue, Diliman, Quezon City  
Tel. Nos. (632)8920-6401\*(632)8920-6446

E-mail: [member\\_relations@sss.gov.ph](mailto:member_relations@sss.gov.ph)\*Website <http://www.sss.gov.ph>

## **REQUEST FOR EXPRESSION OF INTEREST** *REI-SSS-Consulting 2021-010*

### **ORGANIZATIONAL ASSESSMENT (HUMAN RESOURCE – ORGANIZATIONAL DEVELOPMENT CONSULTANCY FIRM FOR THE RESTRUCTURING PLAN OF THE SOCIAL SECURITY SYSTEM)**

1. The **SOCIAL SECURITY SYSTEM (SSS)**, through the Approved 2021 Corporate Operating Budget– MOOE with Code PAP (421) of the 2021 Annual Procurement Plan (APP) intends to apply the sum of (₱ 15,800,000.00) being the Approved Budget for the Contract (ABC) to payments under the contract for the **Organizational Assessment (Human Resource-Organizational Development Consultancy Firm for the Restructuring Plan of the Social Security System)**.

Bids received in excess of **₱15,800,000.00** as ABC shall be automatically rejected at the opening of the financial proposals.

2. The SSS now calls for the submission of eligibility documents for the engagement of the consultancy services of a HR-OD Consultancy Firm to provide technical assistance in undertaking the required procedures of Governance Commission for GOCCs (GCG) in the preparation and submission of the Restructuring Plan of SSS.<sup>1</sup>.

Eligibility documents of interested consultants must be duly received by the BAC Secretariat **on or before 29 July 2021 (Thursday) not later than 2:00 p.m. at the Bidding Room, 2nd Floor, SSS Main Building, East Avenue, Quezon City**. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion. Late submission of eligibility documents shall not be accepted.

Interested consultant must be a firm that has been established for at least five (5) years and must have experience in the Organizational Development and Strategic Human Resource Management.

**Only one company representative is allowed to attend the manual opening of Eligibility Documents. Other company representative may witness the opening of Eligibility Documents through Microsoft Teams. Kindly e-mail us on or before 28 July 2021, through e-mail address [bac@sss.gov.ph](mailto:bac@sss.gov.ph), the following:**

- a. **Name of the representative and e-mail address; and**
- b. **Technical and administrative queries.**

---

<sup>1</sup> A brief description of the terms of reference of the Consulting Service should be provided, including outputs/deliverables, location of project, and other information necessary to enable potential bidders to decide whether or not to respond to the invitation.

3. Interested bidders may obtain further information from the BAC Secretariat and inspect the Bidding Documents at the address in the last item of the ITB from Monday to Friday, 8:00 a.m. to 5:00 p.m.
4. **A complete set of Bidding Documents may be acquired by interested bidders starting 21 July 2021** up to the scheduled submission & receipt of bids from the address stated in the last item of the ITB.

Payment of **₱12,500.00** for the Bidding Documents shall be paid by the Shortlisted Consultant's only.

**The mode of payment will be on a cash basis payable at the SSS Cash Department, Ground Floor, SSS Main Building, upon accomplishment of SSS Form R-6. The Bidding Documents shall be received personally by the prospective Bidder or his authorized representative.**

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 three (3)<sup>2</sup> prospective bidders who will be entitled to submit bids. The criteria and rating system for shortlisting are:

CRITERIA		WEIGHT
1	Applicable Work Experience and Capability of Human Resource – Organizational Development Consultancy Firm	40%
2	Qualification of Personnel	20%
3	Current Workload Relative to Capacity	40%
	<b>Total</b>	<b>100%</b>
	<b>Minimum Passing Rate for Shortlisting</b>	<b>70%</b>

6. 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.

7. The SSS shall evaluate bids using the Quality-Cost Based Evaluation (QCBE). The weights to be allocated for the Technical and Financial Proposals are indicated in Clause 25.1, Section III, Bid Data Sheet, Part II of the Bidding Documents. The criteria and rating system for the evaluation of bids as indicated in the Instructions to Bidders are provided in Clause 25.1 and 26.2, Section III, Bid Data Sheet, Part II of the Bidding Documents.
8. The contract shall be completed **within a maximum of twelve (12) months starting from the receipt of Notice to Proceed (NTP) and Signed Contract** excluding at least 4-time participation as Resource Persons of SSS during meetings with GCG.

---

<sup>2</sup> For World Bank financed contract, the short list should be six (6) Consultants.

9. References to the dates and times shall be based on Philippine Standard time. Should any of the above dates fall on a holiday, the deadline shall be extended to the same time of the immediately succeeding business day in Quezon City.
10. The SSS 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. The SSS assumes no obligation to compensate or indemnify parties for any expense or loss that they may incur as a result of their participation in the procurement process, nor does SSS guarantee that an award will be made as a result of this invitation. Furthermore, the SSS reserves the right to waive any defects or formality in the responses to the eligibility requirements and to this invitation and reserves the right to accept the proposal most advantageous to the agency.
12. For further information, please refer to:

**Bids & Awards Committee**

**The Secretariat**

2<sup>nd</sup> Flr., SSS Main Bldg., East Ave., Diliman, Q.C.

Tel No. (632) 8922-1070; 8920-6401 local 5492 or 6382

Email – bac@sss.gov.ph

13. Bidding Documents may be downloaded from PROCUREMENT tab at [www.sss.gov.ph](http://www.sss.gov.ph) starting **21 July 2021**.

  
**THE CHAIRPERSON**  
**BIDS & AWARDS COMMITTEE**



ref.: rei-consulting-sss-2021-010- HR OD Consultant

## ***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. For procurement to be performed overseas, it shall be subject to the Guidelines to be issued by the GPPB.
    - 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.

However, for Contracting Parties to the Apostille Convention, the documents shall be authenticated through an apostille by the Competent Authority, except for countries identified by the Department of Foreign Affairs (DFA) that will still require legalization (red ribbon) by the relevant Embassy or Consulate.

A Contracting Party refers to a State that has joined the Apostille Convention, whether or not the Convention has entered into force for that State.

A Competent Authority refers to the authority designated by a Contracting Party that is competent to issue an apostille. A Contracting Party may designate one or more Competent Authorities and may designate Competent Authorities that are competent to issue an apostille for certain categories of public documents. Information about designated Competent Authorities may be found on the Apostille Section of the Hague Conference website under "Competent Authorities".

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:
  - (a) contain the name of the contract to be bid in capital letters;
  - (b) bear the name and address of the prospective bidder in capital letters;
  - (c) be addressed to the Procuring Entity’s BAC specified in the **EDS**;
  - (d) bear the specific identification of this Project indicated in the **EDS**; and
  - (e) 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**. In case the deadline for submission of bids fall on a non-working day duly declared by the president, governor or mayor or other government official authorized to make such declaration, the deadline shall be the next working day.

## 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:

(a) the name of the prospective bidder;

(b) whether there is a modification or substitution; and

(c) 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. Shortlisting 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 shortlisting.
- 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 Shortlisting 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>Organizational Assessment (Human Resource – Organizational Development Consultancy Firm for the Restructuring Plan of the Social Security System)</p> <p>An HR-OD Consultancy Firm must have at least five (5) years experience in providing consultancy services in Organization Development preferably with government financial institutions (GFIs)/government-owned and controlled corporations (GOCCs).</p>
1.3	No further instructions.
2	<p><b>Eligibility Requirements:</b></p> <p><u>Legal Documents</u></p> <p>(i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR. For procurement to be performed overseas, it shall be subject to the Guidelines to be issued by the GPPB.</p> <p><u>Technical Documents</u></p> <p>(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 five (5) years prior to the submission and receipt of bids. The statement shall include, for each contract, the following:</p> <p style="margin-left: 40px;">(ii.1) the name and location of the contract;</p> <p style="margin-left: 40px;">(ii.2) date of award of the contract;</p> <p style="margin-left: 40px;">(ii.3) type and brief description of consulting services;</p> <p style="margin-left: 40px;">(ii.4) consultant’s role (whether main consultant, sub-consultant, or partner in a JV)</p> <p style="margin-left: 40px;">(ii.5) amount of contract;</p> <p style="margin-left: 40px;">(ii.6) contract duration; and</p> <p style="margin-left: 40px;">(ii.7) certificate of satisfactory completion or equivalent document specified in the <b>EDS</b> issued by the client, in the case of a completed contract;</p> <p>(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.</p> <p><u>Aside from the required key personnel who will be assigned to the project, the Consultant is also required to enumerate all technical support staff / professionals that are employed by the Consultant, either as a regular employee or on a per-project basis, including their respective Curriculum Vitae.</u></p>

	<p>(iv) 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.</p> <p>(v) <u>Eligibility Document Submission Form (form Supplied)</u></p>
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.7)	<p>Acceptable proof of satisfactory completion of completed contracts:</p> <ol style="list-style-type: none"> <li>1. Submission of Certificate of Completed Contracts</li> <li>2. Submission of Certificate of Completion with performance rating from the clients of completed contracts.</li> </ol>
4.2	<p>Each Bidder shall submit five (5) sets.</p> <ol style="list-style-type: none"> <li>1. One (1) Envelope marked ORIGINAL; and</li> <li>2. Four (4) Envelopes marked COPY NO. ____ .</li> </ol>
4.3 (c)	<p>SOCIAL SECURITY SYSTEM BIDS AND AWARDS COMMITTEE Bidding Room, 2nd Floor, SSS Main Building East Avenue, Diliman, Quezon City</p>
4.3 (d)	<p><b>Organizational Assessment (Human Resource-Organizational Development Consultancy Firm for the Restructuring Plan of the Social Security System)</b></p>
5	<p>The address for submission of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b> <i>Bidding Room, 2nd Floor, SSS Main Building East Avenue, Diliman, Quezon City</i></p> <p>The deadline for submission of eligibility documents is indicated in the Advertisement.</p>
8.1	<p>The place of opening of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b> <i>Bidding Room, 2nd Floor, SSS Main Building East Avenue, Diliman, Quezon City</i></p> <p>The date and time of opening of eligibility documents is indicated in the Advertisement.</p>
9.1	Similar contracts shall refer to the conduct of Organization Analysis and Review and Organizational and Staffing Design towards the Establishment of an Organizational Restructuring Plan.

## I. Eligibility of the HR-OD Consultancy Firm

## 1. The HR-OD Consultancy Firm:

- Must have at least five (5) years experience in providing consultancy services in Organization Development preferably with government financial institutions (GFIs)/government-owned and controlled corporations (GOCCs).
- Must be composed of experts/professionals in Organization Development, Strategic Human Resource Management, Social Insurance, or Financial Services (e.g. banks) and has the capability to complete the project within 12 months.

The Head of the HR-OD Consultancy Firm must have at least five (5) years experience in organization development including organizational re-structuring, job levelling, among others.

## II. Required eligibility documents pursuant to Republic Act No. 9184, otherwise known as the "Government Procurement Reform Act".

**CRITERIA AND RATING SYSTEM FOR SHORTLISTING OF CONSULTANTS**

The criteria and rating system which will be used for shortlisting is as follows:

CRITERIA	RATING PER CATEGORY	RATING
<b>1. Applicable Experience and Capability of HR-OD Consultancy Firm</b>		<b>40%</b>
a. Number of years in providing consultancy services in Organizational Development with engagements preferably to government financial institutions (GFIs)/ government-owned and controlled corporations (GOCCs).	<b>25 %</b>	
• 5 years	16	
• 6-7 years	18	
• 8-9 years	21	
• 10 years and above	25	
b. Number of completed similar projects preferably with government financial institutions (GFIs)/government-owned and controlled corporations (GOCCs) in the last five (5) years prior to the submission of Eligibility Requirement	<b>15 %</b>	
• With 1 completed similar project	7	
• With 2 - 3 completed similar projects	11	
• With 4 or more completed similar projects	15	

<b>2. Qualification of Personnel who may be assigned to the project</b>		<b>20 %</b>																				
a. Years of experience of the identified members of the HR-OD Consultancy Firm on the following prior to the submission of Eligibility Requirements	<b>12.5 %</b>																					
a.1 Organizational Development <ul style="list-style-type: none"> <li>• 5 years</li> <li>• 6-7 years</li> <li>• 8-9 years</li> <li>• 10 years or more</li> </ul>	<b>5%</b> 3 4 4.5 5																					
a.2 Strategic Human Resource Management <ul style="list-style-type: none"> <li>• 5 years</li> <li>• 6-7 years</li> <li>• 8-9 years</li> <li>• 10 years or more</li> </ul>	5 % 3 4 4.5 5																					
a.3 With companies/institutions whose core business covers Social Insurance or Financial Services (e.g. banks)	<b>2.5 %</b>																					
b. Years of experience of the Head of the HR-OD Consultancy Firm in organization development including organizational restructuring, staffing analysis and design, among others <ul style="list-style-type: none"> <li>• 5 years</li> <li>• 6-7 years</li> <li>• 8-9 years</li> <li>• 10 years or more</li> </ul>	<b>7.5 %</b> 5 5.5 6.5 7.5																					
<b>3. Current Workload Relative to Capacity</b>		<b>40 %</b>																				
<p>This shall be computed as follows:  <b>No. of Professional Staff ÷ No. of On-going Projects</b></p> <p>Answer: Highest Ratio will be given  100.00 points  Lower Ratio will be pro-rate accordingly</p> <p>For example:</p> <table border="1" data-bbox="456 1823 1036 2050"> <thead> <tr> <th>Consultant</th> <th>No. of Professional Staff</th> <th>On-Going Projects</th> <th>Ratio of Personnel over on-going contracts</th> <th>Total Points / Rating</th> </tr> </thead> <tbody> <tr> <td>A</td> <td>40</td> <td>5</td> <td>8</td> <td>68.55</td> </tr> <tr> <td>B</td> <td>35</td> <td>3</td> <td>11.67</td> <td>100</td> </tr> <tr> <td>C</td> <td>20</td> <td>2</td> <td>10</td> <td>85.70</td> </tr> </tbody> </table> <p><b>Notes:</b></p> <ol style="list-style-type: none"> <li>No. of Professional Staff for the Project shall be the nominated Key Personnel and the rest of the Consultant's Professional Staff, as required per Eligibility Data Sheet 2 (iii)</li> <li>No. of On-going projects shall be taken from the Statement of On-going projects as per Eligibility Data Sheet 2.1</li> </ol>			Consultant	No. of Professional Staff	On-Going Projects	Ratio of Personnel over on-going contracts	Total Points / Rating	A	40	5	8	68.55	B	35	3	11.67	100	C	20	2	10	85.70
Consultant	No. of Professional Staff	On-Going Projects	Ratio of Personnel over on-going contracts	Total Points / Rating																		
A	40	5	8	68.55																		
B	35	3	11.67	100																		
C	20	2	10	85.70																		
<b>Total</b>		<b>100 %</b>																				



	<b>Passing Rate</b>		<b>70 %</b>
--	---------------------	--	-------------

## ELIGIBILITY DOCUMENTS SUBMISSION FORM

---

[Date]

### SOCIAL SECURITY SYSTEM

East Avenue, Diliman, Quezon City

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated *[insert date]* for **Organizational Assessment (Human Resource-Organizational Development Consultancy Firm for the Restructuring Plan of the Social Security System)**, *[Name of Consultant]* hereby expresses interest in participating in the eligibility and shortlisting 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

**STATEMENT OF ON-GOING GOVERNMENT AND PRIVATE CONTRACTS**

NAME & LOCATION OF THE CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON, CONTACT NUMBER AND E-MAIL ADDRESS

**STATEMENT OF COMPLETED GOVERNMENT AND PRIVATE CONTRACTS**

NAME & LOCATION OF THE CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON, CONTACT NUMBER AND E-MAIL ADDRESS	CERTIFICATE OF SATISFACTORY COMPLETION OR EQUIVALENT DOCUMENT ISSUED BY THE CLIENT

**STATEMENT OF SIMILAR GOVERNMENT AND PRIVATE CONTRACTS  
FOR CONSULTANCY WITH ATTACHED SUPPORTING DOCUMENTS  
(i.e. CONTRACTS)**

NAME & LOCATION OF THE CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON, CONTACT NUMBER AND E-MAIL ADDRESS

