



Republic of the Philippines
PHILIPPINE HEALTH INSURANCE CORPORATION
Citystate Centre, 709 Shaw Boulevard, Pasig City
☎ (02) 8662-2588 🌐 www.philhealth.gov.ph
📘 PhilHealthOfficial 📧 teamphilhealth

ELIGIBILITY DOCUMENTS

Procurement of Consulting Services for the Business Process Review and Readiness Assessment and Assistance for PhilHealth Digitalization Transformation in Preparation for the Adoption of Philippine Financial Reporting Standards 17,9 and other Applicable Standards

IB No. PFRS 2024-01-CS

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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

Notes on Request for Expression of Interest

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

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

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

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

(d) The contract duration.

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

REQUEST FOR EXPRESSION OF INTEREST FOR

PROCUREMENT OF CONSULTING SERVICES FOR THE BUSINESS PROCESS REVIEW AND READINESS ASSESSMENT AND ASSISTANCE FOR PHILHEALTH DIGITALIZATION TRANSFORMATION IN PREPARATION FOR THE ADOPTION OF PHILIPPINE FINANCIAL REPORTING STANDARDS 17,9 AND OTHER APPLICABLE STANDARDS

(IB No. PFRS 2024-01-CS)

1. The *Philippine Health Insurance Corporation*, through the CY 2024 Corporate Operating Budget intends to apply the sum of Fourteen Million Eight Hundred Forty-Three Thousand Five Hundred Sixty-Three Pesos and Fifty-Four Centavos (P14,843,563.54) being the Approved Budget for the Contract (ABC) to payments under the contract for the Procurement of Consulting Services for the Business Process Review and Readiness Assessment and Assistance for PhilHealth Digitalization Transformation in Preparation for the Adoption of Philippine Financial Reporting Standards 17,9 and other Applicable Standards with Invitation to Bid (IB) No. PFRS 2024-01-CS. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The *Philippine Health Insurance Corporation* now calls for the submission of eligibility documents for Procurement of Consulting Services for the Business Process Review and Readiness Assessment and Assistance for PhilHealth Digitalization Transformation in Preparation for the Adoption of Philippine Financial Reporting Standards 17,9 and other Applicable Standards.

Eligibility documents of interested consultants may be acquired by interested Bidders on **April 5, 2024- April 18, 2024 (8:00 A.M. to 3:00 P.M) working days only excluding holidays and on April 19, 2024 (8:00A.M. to 10:00A.M)** at the address below and upon payment of One Thousand Pesos (Php1,000.00) for the Eligibility Documents. Applications for eligibility will be evaluated based on a nondiscretionary "pass/fail" criterion.

The Philippine Health Insurance Corporation will hold a Pre-Eligibility Conference on **April 12, 2024, 10:30 a.m.** at SBAC Conference Area (Room 1004), PhilHealth Head Office, 10th Floor Citystate Centre, 709 Shaw Blvd., Bgy. Oranbo, Pasig City and through video conferencing via MS Teams, which shall be open to prospective bidders.

The deadline for the submission and the opening of Eligibility Documents shall be on **April 19, 2024 on or before 10:30 a.m.** at SBAC Conference Room, (Rm. 1004), PhilHealth Head Office, 10thFlr., Citystate Centre 709 Shaw Blvd., Brgy. Oranbo, Pasig City and via MS Teams (Link will be provided the day before the activity).

Bids will be opened in the presence of the bidders' representatives who choose to attend the activity. Bids must be duly received by the BAC Secretariat through

manual submission at the office address indicated below at room 1003 on or before **April 19, 2024 at 10:30 a.m.**

3. Interested bidders may obtain further information from Philippine Health Insurance Corporation- Secretariat for the Bids and Awards Committees and inspect the Bidding Documents at the address given below during *8:00 a.m. to 4:00 p.m.*
4. A complete set of Bidding Documents may be acquired by interested Bidders on **April 26, 2024- May 14, 2024 (8:00 A.M. to 3:00 P.M) working days only excluding holidays and on May 15, 2024 (8:00A.M. to 10:00A.M)** from the address below *and upon payment of the applicable fee for the Bidding Documents, pursuant to the latest Guidelines issued by the GPPB, in the amount of **Ten Thousand Pesos (P10,000.00)**.* It may also be downloaded free of charge from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Philippine Health Insurance Corporation, 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) consulting firms** who will be entitled to submit bids.

The criteria and rating system for short listing are:

Company Experience	: 40%
Qualification of Personnel	: 45%
Current Workload	: 15%

The minimum passing score for the short listing criteria is seventy percent (70%).

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 open to all interested bidders, whether local or foreign, subject to the conditions for eligibility provided in the IRR of RA 9184.

7. The Procuring Entity shall evaluate bids using the **Quality-Cost Based Evaluation (QCBE) procedure**. The technical and financial proposal shall carry seventy percent (70%) and thirty percent (30%) percent weight in the bid evaluation, respectively. Bids whose technical proposal pass the minimum technical rating of seventy (70%) shall have its financial proposals opened and evaluated. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders.

8. The contract shall be completed within *twelve (12) months*.
9. The *Philippine Health Insurance Corporation* 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.
10. For further information, please refer to:

Secretariat for the Bids and Awards Committees

PhilHealth Head Office, Room 1003, 10th Floor,
Citystate Centre Building 709 Shaw Blvd., Bgy. Oranbo, Pasig City
Telephone: 8662-2588 local 7675 /8637-4735
Email address: sst.sbac@gmail.com

Jaragon
SVP JOVITA V. ARAGONA
Chairperson, BAC-CS & INFRA

Section II. Eligibility Documents

Notes on the Eligibility Documents

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

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

1. Eligibility Criteria

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

2. Eligibility Requirements

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

Legal Documents

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

Technical Documents

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

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

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.
- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, sub consultants 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

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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.

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- 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.

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Section III. Eligibility Data Sheet

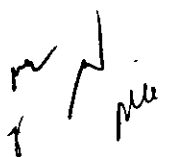
Notes on the Eligibility Data Sheet

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

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

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

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



Eligibility Data Sheet

Eligibility Documents	
1.2	The consultant shall assess PhilHealth's journey towards the transition and adoption of PFRS 17 and other applicable standards. In general, the consultant shall perform a readiness assessment study, analyzing the results, and presenting the findings and recommendations to resolve accordingly.
1.3	<p>Foreign consultants may be eligible to participate in this Project, subject to the following conditions to be complied within ten (10) days upon receipt of the Notice of Award:</p> <ul style="list-style-type: none"> a) must be registered with the SEC and/or any agency authorized by the laws of the Philippines; b) when the types and fields of consulting services in which the foreign consultant wishes to engage involve the practice of regulated professions, the foreign consultant must be authorized by the appropriate GoP professional regulatory body specified in Clause 1.2 to engage in the practice of those professions and allied professions: <i>Provided, however</i>, That the limits of such authority shall be strictly observed.
2.1(a)(ii)	<p>The statement of all ongoing and completed government and private contracts shall include all such contracts within Five (5) years (April 19, 2019-April 18, 2024) prior to the deadline for the submission and receipt of eligibility documents.</p> <p>Accomplish the following Annexes:</p> <ul style="list-style-type: none"> • Annex "D-1" for all the on-going projects and not yet started. • Annex "D-2" for all the completed projects
2.1(a)(ii.7)	<p>For Ongoing projects- Certified True Copy of Notarized Contract</p> <p>For completed projects- Certified True Copy of Notarized Contract and Certificate of Satisfactory Completion or Certificate of Final Acceptance.</p>
4	<p>Each bidder shall submit one (1) mother envelope which contains the three (3) envelopes.</p> <p>The first envelope shall be labeled as "ORIGINAL BID", containing the "ORIGINAL ELIGIBILITY COMPONENT ENVELOPE".</p> <p>The second envelope shall be labeled as "COPY No. 1", containing "COPY No. 1 – ELIGIBILITY COMPONENT ENVELOPE"</p>

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	<p>The second envelope shall be labeled as “COPY No. 2”, containing “COPY No. 2” – ELIGIBILITY COMPONENT ENVELOPE”</p> <p>All envelopes shall be labelled and shall indicate the following details:</p> <ol style="list-style-type: none"> 1. Name of the contract to be bid 2. Name and Address of the bidder 3. Recipient BAC/ Procuring Entity 4. With remarks: “Do not open before (Date and time of opening of bids)” <p>All documents should be properly identified and tabbed for easy reference.</p>
(e)	<p>Bids and Awards Committee- Consulting Services and Infrastructure (BAC-CS & INFRA)</p>
(f)	<p>Detailed activities are as follows:</p> <p>Phase 1</p> <ol style="list-style-type: none"> 1. Preparation of inception report on the requirements for the PFRS 17 transition and adoption, and proposed amendments to the implementation of PFRS 9, if any, including the areas of improvement and development. 2. Assessment of readiness of PhilHealth in the implementation of PFRS 17, and required changes to the implementation of PFRS 9, with the minimum activities to be considered as follows: <ul style="list-style-type: none"> • PhilHealth’s completeness, accuracy, and readiness of digital financial data on transactional and operational basis, beyond just general ledger (GL) including the reconciliation of GL and sub ledger; • PhilHealth’s preparation on the implementation of digitalized core business operations including fully digitalized accounting system and process, and compliance to statutory obligations; and • PhilHealth’s readiness of actuarial system, process, model and data and reporting. 3. Development of PhilHealth functional requirements in compliance with PFRS 17, and proposed amendments to the implementation of PFRS 9, which include the following minimum activities:

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	<ul style="list-style-type: none"> • Preparation of TOR for PFRS 17 system procurement; • Preparation of accounting reports showing the effect of PFRS 17 compliance including the appropriate adjusting entries for GL posting; • Recommendation of strategies and tactics in the development of a comprehensive plan for a fully digitalized policy administration system, accounting system, actuarial system and all associated processes including the methodology for subsequent; and • Recommendation of changes, if any, to the implementation of PFRS 9. <p>Phase 2</p> <p>4. Supervision on the implementation of PFRS 17, with the minimum activities to be considered as follows:</p> <ul style="list-style-type: none"> • Provide guidance and assistance in the preparation of required prework based on the result of the readiness assessment and recommendations; • Recommend to PhilHealth transition plan on the implementation of PFRS 17 and other applicable accounting standards until the full implementation and roll-out is done; and • Orientation of proposed business process based on PFRS 17 to the process owners.
0	<p>Pre-Eligibility Conference will be on April 12, 2024, 10:30 A.M.</p> <p>The address for submission of eligibility documents is Office of the Secretariat for the Bids and Awards Committee (SBAC), SBAC Conference Room 1004, 10th floor, 709 CityState Centre Bldg. Shaw Blvd. Brgy. Oranbo, Pasig City</p> <p>The deadline for submission of eligibility documents is on April 19, 2024, on or before 10:30 A.M.</p>
0	<p>The place of opening of eligibility documents is Office of the Secretariat for the Bids and Awards Committee (SBAC), SBAC Conference Room 1004, 10th floor, 709 CityState Centre Bldg. Shaw Blvd. Brgy. Oranbo, Pasig City</p> <p>The date and time of opening of eligibility documents is on April 19, 2024, 10:30 A.M.</p>
0	<p>Similar contracts shall refer to:</p>

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	<p>Business Process Review and Implementation of the following:</p> <ul style="list-style-type: none"> • Adoption and implementation of Philippine Financial Reporting Standard (PFRS) International Financial Reporting Standard (IFRS) 17 • Applicable PFRS/IFRS
	<p>The criteria and rating system for short listing are:</p> <p>Company Experience : 40%</p> <p>Qualification of Personnel : 45%</p> <p>Current Workload : 15%</p>

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Checklist of Eligibility Documents

1.	Eligibility Documents Submission Form (Annex "B")
<u>Class "A" Documents</u>	
Legal Documents	
2	<ul style="list-style-type: none"> Valid and updated PhilGEPS Certificate of Registration and Membership.
Technical Documents	
4	<p>The statement of all ongoing and completed government and private contracts, including contract awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within 5 years (April 19, 2019-April 18, 2024) prior to the deadline for the submission and receipt of eligibility documents.</p> <p>Accomplish the following Annexes:</p> <ul style="list-style-type: none"> Annex "D-1" for all the on-going projects and not yet started. Annex "D-2" for all the completed projects
5	<p>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>Statement shall be supported by the following documents:</p> <ol style="list-style-type: none"> Curriculum vitae with list relevant trainings Copy of professional license; and Certificate of degree and other relevant trainings.
Financial Documents	
6	<p>The consultant's audited financial statements, showing, among others, the consultant's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission.</p>
<u>Class "B" Documents</u>	
7	<p>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>

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ELIGIBILITY DOCUMENTS SUBMISSION FORM

[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

Key Personnel and their Qualifications

The Key Personnel:

The winning proponent's team must be composed of highly technical staff, with the following specific requirement

Key Personnel	Education	Experience	No. (min)
Project Manager	<ul style="list-style-type: none"> • Must be graduate, with a Bachelor of Science degree in Accountancy, Physics, Mathematics, Computer Science, Information Technology, Information Science, Actuarial Science, or Engineering 	<ul style="list-style-type: none"> • Must have at least fifteen (15) years of combined experience in financial services and advisory • Must have conducted at least three (3) consultancy services, training or combined engagements • Must have a working experience as project manager for at least one (1) government agency, involving organizational transformation and business process re-engineering • Managed at least two (2) accounting systems engagements 	1
PFRS 17 Consultant	<ul style="list-style-type: none"> • Must be graduate, with a Bachelor of Science degree in Accountancy, Physics, Mathematics, Computer Science, Information Technology, Information Science, Actuarial Science, or Engineering 	<ul style="list-style-type: none"> • Must have a minimum of ten (10) years of combined experience in management, consultancy, advisory, or corporate services • Should have conducted at least two (2) consultancy services on PFRS 4, 15, 9 or 17; (support this with a list of client companies or organizations) • Preferably, has at least 	1

		<p>five (5) year of work experience in life, non-life, health insurance, social security, pension funds, or banking, and preferably involving organizational transformation and business process re-engineering or digitalization</p> <ul style="list-style-type: none"> • Managed at least two (2) accounting systems engagements 	
<p>Consulting Staff</p>	<ul style="list-style-type: none"> • Must be graduate, with a Bachelor of Science degree in Accountancy, Physics, Mathematics, Computer Science, Information Technology, Information Science, Actuarial Science, or Engineering 	<p>2</p> <ul style="list-style-type: none"> • Must have a minimum of ten (10) years of combined experience in financial, systems implementation, or advisory • Preferably, has at least five (5) years of work experience in life, non-life, health insurance, social security, pension funds, or banking, involving at least one (1) project in organizational transformation and business process re-engineering or digitalization • Must possess sound knowledge on PFRS 4, 17, 9, 15 among others 	
<p>Technical Staff</p>	<ul style="list-style-type: none"> • Must be graduate, with a Bachelor of Science degree in Accountancy, Physics, Mathematics, Computer Science, Information Technology, Information Science, Actuarial Science, or Engineering 	<p>2</p> <ul style="list-style-type: none"> • Must have a minimum of three (3) years of combined experience in financial, systems implementation, or advisory • Preferably, has at least one (1) year of work experience in life, non-life, health insurance, social security, pension funds, or banking, and 	

Handwritten signature

		preferably involving at least one (1) project in organizational transformation and business process re-engineering or digitalization • Must possess sound knowledge on PFRS 4, 17, 9, 15 among others	
TOTAL			6

The list of "Key Personnel" to be assigned to this project shall be submitted indicating their full name/s (Last Name, First Name, Middle Name) along with their role/s (e.g. Project Manager), each role/s must have a full-time named manpower resource per the number specified. The number of key personnel per above matrix is the minimum requirement, except for the Project Manager.

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Annex “D-1”

Statement of all ON-GOING

government and private contracts, including contract awarded but not yet started, if any,
 whether similar or not similar in nature and complexity to the contract to be bid,
 within **5 years (April 18, 2019- April 19, 2024)**
 prior to the deadline for the submission and receipt of eligibility documents.

Business Name: _____

Business Address: _____

Period: _____

Name and Location of the Contract	Date of Award of the Contract	Type and Brief Description of Consulting Services	Consultant's Role (whether main consultant, subcontractor, or partner in a JV)	Amount of Contract	Contract Duration	Nature and Description of the Contract whether it is similar or not similar	Status of the Project (ongoing, and implemented, awarded but not yet started)	List of all the names and designation of all the key staff involved in each project (May be submitted on a separate sheet)
Government Contracts								
Private Contracts								

Signature over Printed Name
 Title of Authorized Signatory
 Name of Consulting Firm
 Address

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Annex "D-2"

Statement of all COMPLETED

government and private contracts, including contract awarded but not yet started, if any,
 whether similar or not similar in nature and complexity to the contract to be bid,
 within **5 years (April 18, 2019- April 19, 2024)**
 prior to the deadline for the submission and receipt of eligibility documents.

Business Name: _____

Business Address: _____

Period: _____

Name and Location of the Contract	Date of Award of the Contract	Type and Brief Description of Consulting Services	Consultant's Role <small>(whether main consultant, subcontractor, or partner in a JV)</small>	Amount of Contract	Contract Duration	Nature and Description of the Contract whether it is similar or not similar

Signature over Printed Name
 Title of Authorized Signatory
 Name of Consulting Firm
 Address

Note: This statement shall be supported by:
 Certified True Copy of Notarized Contract and Certificate of Satisfactory Completion or Certificate of Final Acceptance.

Handwritten initials/signature