

REQUEST FOR QUOTATION

Date: May 13, 2025RFQ No. 2025-095

The **Philippine Health Insurance Corporation (PhilHealth)** through its Secretariat for the Bids and Awards Committees (SBAC), intends to procure the following through Section 34 Small Value Procurement of the Implementing Rules and Regulations of Republic Act 12009:

RESOURCE SPEAKER/ TRAINING PROVIDER FOR THE TRAINING ON MS EXCEL

Approved Budget : **₱960,000.00**
Purchase Request No/s : **25-0221-SVP, HRD**
Delivery Period : **Batch 1 - May 20-22, 2025**
Batch 2 - June 9-11, 2025
Batch 3- June 24-26, 2025
Batch 4- July 15-17, 2025

Interested resource speaker/training providers of known qualifications are hereby invited to submit a price quotation/proposal duly signed by its authorized representative **on or before 3:00 p.m. of May 19, 2025** through electronic email or physically at the address below:

SECRETARIAT SERVICES TEAM
Secretariat for the Bids and Awards Committees (SBAC)
Philippine Health Insurance Corporation (PhilHealth)
Rm. 408, 4th Floor, SBAC Office
709 Citystate Centre, Shaw Blvd.,
Pasig City
Telephone Nos.: (02) 8441-7444 local 7675

afelato
MS. CHARISS GAIL H. DALIDA
BAC Secretariat/Canvasser
dalidac@philhealth.gov.ph

Joseph Vergara
MR. JOSEPH O. VERGARA
Head, Secretariat for the Bids and Awards Committees

The Provider shall also submit a copy of the following documentary requirements along with the duly signed quotation on or before the deadline of submission of quotation:

1. Mayor's /Business Permit for CY2025;
2. PhilGEPS Registration Number or Certificate of PhiGEPS Registration (Platinum Membership);
3. Proof of payment for the PhilHealth Contribution (1st Quarter of 2025);
4. Notarized Omnibus Sworn Statement; and
5. Valid Tax Clearance.

****INSTRUCTION TO SUPPLIERS****

- Submit your duly signed quotation using the prescribed Quotation Form together with the compliance with the Terms and Conditions and Technical Specifications (Annexes A, B and C of the RFQ);
- Provide all the required information of the provider/supplier in the **Quotation Form** and do not alter the contents of the form in any way.
- Non-compliance with the submission of the **Quotation Form** and **Documentary Requirements** as stated above **within the given deadline** shall be automatically **DISQUALIFIED**.
- **Demo Teach will be required to the provider with the Lowest Calculated Quotation.**

“ANNEX A”

QUOTATION FORM

Name of Company: _____
Address: _____
Contact Person: _____
Contact Number: _____
Email Address: _____

After having carefully read and accepted the Terms and Conditions of this RFQ specified in Annex B, hereunder is our quotation/s for the item/service as follows:

Item No.	QTY/ Unit	Unit Price	Total Price	ITEM Description and Technical Specifications	STATEMENT OF COMPLIANCE ("Comply" or "Not Comply")	Supplier's Offer <i>Do not fill this out if you did not comply with the Tech Specs.</i>	
						Unit Price	Total Price
1	12 days	80,000.00	P960,000.00	RESOURCE SPEAKER/ TRAINING PROVIDER FOR THE TRAINING ON MS EXCEL FOR 33 ATTENDEES PER DAY FOR 3 DAYS, 4 BATCHES			
				See attached "ANNEX C" for Technical Specifications			
			P960,000.00			TOTAL:	

COMPLIANCE TO THE DELIVERY PERIOD UPON RECEIPT OF THE P.O. / J.O.	Statement of Compliance ("Comply" or "Not Comply")
Batch 1 - May 20-22, 2025 Batch 2 - June 9-11, 2025 Batch 3- June 24-26, 2025 Batch 4- July 15-17, 2025	

I hereby certify to comply and deliver all the above requirements.

Signature over Printed Name

Position / Designation

Date

“ANNEX B”

TERMS AND CONDITIONS:

1. Suppliers/Providers shall provide correct and accurate information required in this form.
2. **Suppliers/Providers shall quote on the project.**
3. Price quotation/s must be valid for **thirty (30) calendar days** from the date of submission.
4. Price quotation/s, to be denominated in Philippine Peso shall include all taxes, duties and/or levies payable.
5. Quotation exceeding the Approved Budget for the Contract of the item shall be rejected.
6. Award of contract shall be made to the lowest quotation (for goods and infrastructure), passed the technical evaluation or, the highest rated offer (for consulting services) which complies with the minimum technical specifications and other terms and conditions stated herein.
7. Any interlineations, erasures or overwriting shall be valid only if they are signed or initialed by you or any of your duly authorized representative/s.
8. The item/s shall be delivered according to the requirements specified in the Technical Specifications and the official address of the corporation.
9. PhilHealth shall have the right to inspect and/or to test the goods to confirm their conformity to the technical specifications.
10. In case two (2) or more suppliers are determined to have submitted the Lowest Calculated Quotation/Lowest Calculated and Responsive Quotation, PhilHealth shall adopt and employ “draw lots” as the tie-breaking method to finally determine the single winning provider in accordance with the GPPB Circular 06-2005.
11. **Payment shall be made via check (Land Bank) after delivery and upon the submission of the required supporting documents, inspection and acceptance.**
12. Liquidated damages equivalent to one-tenth of one percent (0.1%) of the value of the goods not delivered within the prescribed delivery period shall be imposed per day of delay. PhilHealth shall rescind the contract once the cumulative amount of liquidated damages reaches ten percent (10%) of the amount, without prejudice to the other courses of action and remedies open to it.
13. Warranty Security of one percent (1%) of the gross amount (for items with warranty) shall be automatically deducted from the contract for a minimum warranty period of three (3) months for expendable goods or one (1) year warranty for non-expendable goods and shall be returned after the lapse of the warranty period provided however that the goods delivered are free from defects and all the conditions imposed under the contract have been fully met.
14. The contracting parties shall comply with Office Order No. 0018-2015 “Reiteration of PhilHealth No Gift Policy (Revision 1).
15. Each of the documents submitted in satisfaction of the requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.

I hereby declare that I understand and acknowledge the instructions and terms and conditions listed herein.

Signature over Printed Name

Position / Designation

Date

**TECHNICAL SPECIFICATIONS
FOR TRAINING PROVIDER/ SUBJECT MATTER EXPERT**

- I. **PROGRAM TITLE:** Training on MS Excel
- II. **DATE OF CONDUCT:** 2nd and 3rd Quarter of CY 2025
- III. **TRAINING PROVIDER(TP)/ SUBJECT MATTER EXPERT (SME) SPECIFICATIONS:**

A. PRE-TRAINING REQUIREMENTS:

1. The TP/SMEs shall be highly proficient or an expert in customizing a training design/module appropriate in achieving the objectives of the training course.
2. The TP shall provide a Resource Speaker that has expertise on the specified program.
3. The TP must be a Microsoft partner in learning solutions and provide a Microsoft Certificate of Achievement to the attendees after the training completion.
4. The TP/SMEs shall conduct a thorough Learning Needs Analysis (LNA) prior to customization of training design/module.
5. The Training Provider/Subject Matter Expert/s shall develop an interactive learning program.
6. The TP/SMEs shall present the customized training design/module and facilitate a walk-through session to the Human Resource Department (HRD) – Learning & Development (L&D) Team, at least fifteen (15) working days prior to the actual date of training conduct to ensure that the training objectives will be met.
7. The TP/SMEs shall comply strictly with the provisions of the contract before payment shall be processed by the L & D Team.
8. At least ten (10) days before the date of training conduct, the TP/SMEs must submit to L&D Coordinator a soft copy of the Facilitator's Guide (see attached format), training modules, hand-outs/training manual, pre-test and post-test, sample training certificates, presentation materials and other relevant information materials, including those that shall be provided to the participants.
9. Job Order Contract must be completely signed by the TP/SME and PhilHealth Officers before the conduct of the training.
10. The TP/SMEs must be able to submit the company and Resource Speaker's profile and all other necessary documents as required by the procurement law.
11. The professional fee of the TP/SME shall be within the allowable limit for package deal engagement good for a minimum of 25 to a maximum of 40 or more participants per batch depending on the type of program.
12. The TP/SMEs shall also customize a "Training Effectiveness Evaluation Form" (TEEF) with administrator's guide, which will be used by HRD as a tool in evaluating the training effectiveness 1-3 months or 12 months after the training for the level 3 evaluation. The TEEF shall include instructional materials for the



administrator/evaluator on how to conduct, analyze and report the training evaluation.

13. The TP/SME shall provide a training team that will act as training assist, facilitator and/or moderator during the actual conduct of the program.

B. ACTUAL TRAINING CONDUCT

14. The TP/SME shall provide the following training documents/ materials:

- a. First day of the Actual Training Conduct:

1. Training Kit (i.e, nameplates with ID holder, notepad/ filler notebook, ballpens, pencil, highlighter/marker, folder/binder/ training kit envelope);
2. Hand-outs, activity sheets, testing materials appropriate for the learning environment; and,
3. Printed Training Certificate of Completion (A4/ A5) signed by the SME enclosed in a certificate holder.

- b. Last day of the Actual Training Conduct:

1. For purposes of quality monitoring, the Training Provider/Subject Matter Expert shall video record the whole conduct of the program and provide raw copy to the L&D Team; and,
2. Same- Day Edit (SDE) of the conducted training shall be presented to the participants as part of the closing session. Copy of the SDE shall be submitted to the Human Resource Program and Standards Division- L&D Team.

15. Structured Learning Exercises (SLEs), gamification and other latest trends on conducting training programs. The TP/SMEs shall provide tokens/ prizes for SLEs/ games, energizers and management of learning activities.
16. The TP/SMEs shall conduct a pre-test, post-test and give feedback/assessment to the participants to be able to measure the knowledge and skills they acquired during the course of the training/workshop. They shall be the one to check the answer sheets and prepare a comprehensive summary report of the pre-test and post-test results (to be included in the terminal report). The answered test papers shall be owned by the HRD for internal quality audit purposes.
17. The TP/SMEs must be able to execute the training program based on the agreed training design.
18. Attends/ participates in the debriefing sessions and make necessary adjustments in the training activities, course content, delivery, etc., as agreed upon with the PhilHealth L&D Team.

C. POST TRAINING REQUIREMENTS

19. The TP/SMEs must submit a comprehensive terminal report (see attached format), along with a printed 5R-sized glossy, colored class photo for each participant, which will either accompany the certificate of completion or be placed inside a photo holder/standee, and all the requirements specified in this TOR within four (4) weeks after the conduct of the training program or as may be agreed with the HRD. Incomplete submission of requirements shall be a valid reason for non-processing of payment.
20. The TP/SME must agree with the sent-bill scheme and comply with all the requirements that will be needed by the Secretariat for the Bids and Awards Committee (SBAC) of PhilHealth and PhilHealth Comptrollership Department during the processing of the payee's voucher such as but not limited to, if applicable:

- a. BIR Annual Tax Return
- b. BIR Certificate of Exemption
- c. Latest Proof of PhilHealth Contribution
- d. Professional License/Curriculum Vitae
- e. PhilGeps Registration
- f. Sample of Official Receipt
- g. SEC Certificate of Registration, Updated Mayor's/Business
- h. Statement of Account/Billing Statement/Sales Invoice

D. GENERAL PROVISIONS:

21. For first time TP/SME to a certain program, the SME shall pass the demo teach with a score of 85% or above based on the following criteria:
 - a. Mastery of the Topic - 40%
 - b. Communication Skills – 20%
 - c. Training Methodologies – 20%
 - d. Public Speaking and Physical Appearance – 20%
22. The TP/SME who have already conducted the same program, he/she must have earned at least 85% Performance Rating based on the previous training conduct in PhilHealth Head Office and shall no longer need to undergo a Demo Teach.
23. The TP/SMEs shall be blacklisted from the roster of PhilHealth's TP/SMEs in case any provision in the agreed contract and Technical Specifications are retracted or were not completely rendered by the TP/SMEs. A recommendatory report to blacklist the TP/SMEs shall be prepared by the HRD for approval of the Human Resource Development Committee (HRDC) and dissemination for the information of all offices and departments in PhilHealth.
24. The TP/SMEs shall undertake to comply with Officer Order No. 0018-2015 entitled "Reiteration of PhilHealth No Gift Policy (Revision 1)", which enforces that "No PhilHealth personnel shall solicit, demand, or accept, directly or indirectly, any gift from any person, group, association, or judicial entity, whether from the public or private sector at any time, on or off the work premises where such gift is given in the course of official duties or in connection with any transaction which may affect the functions of their office or influence the actions of directors or employees, or create the appearance of a conflict of interest."
25. The TP/SMEs shall agree that:
 - i. Delay or failure to comply with or breach of any of the terms and conditions of the contract with PhilHealth, if occasioned by or resulting from an act of God or public enemy, fire, explosion, earthquake, perils of the sea, flood, war declared or undeclared, civil war, revolution, civil commotion or other civil strife, riot, strikes, blockade, embargo, sanctions, epidemics, act of any Government or other Authority, compliance with Government orders, demands or regulations, or any circumstances of like or different nature beyond the reasonable control of the Party so failing, will not be deemed to be a breach of the agreement nor will it subject either Party to any liability to the other.

- ii. Should either Party be prevented from carrying out its contractual obligations as a result of a force majeure event, the Parties, if possible, shall come to a mutually acceptable arrangement, as to the earliest available time to conduct the program for both the Provider's speakers and PhilHealth participants, without liability for either Party.
- iii. The parties and any or all of their staff or representatives who will be involved in the project shall sign a mutual Non-Disclosure Agreement and maintain strict confidentiality on any information accessed from the PhilHealth database or provided by PhilHealth. Therefore, the TP/SME shall not disclose any proprietary or confidential information relating to PhilHealth or to contract agreement without prior written consent from the latter. This condition shall apply even after the contract ends.
- iv. The TP/SME agree that PhilHealth may take photos and record videos of the training conduct as part of PhilHealth's in-house documentation and quality checking procedure which may be used for internal and external communication/publication on Learning and Development projects.
- v. The TP/SME shall be capable of planning, running and evaluating the training program through the most appropriate and effective learning modes/platform that is compliant with the data and information security policy of the Corporation. This includes the exchange of information, conduct of meetings and submission of documents such as certificates, TNA tools and training materials.

Note: For the training activity to be considered valid and compliant with the CSC PRIME – HRM Requirements and Corporate Order on Learning and Development Management System, the End-User/Training Proponent shall ensure that the Third Party Training Provider must be able to comply with the conditions specified in this technical specifications. Copy of this document may be provided to the third party subject matter expert during canvassing.

I hereby certify to comply and deliver all the above requirements.

Signature over Printed Name

Position / Designation

Date