



Annex "A": Checklist for Eligibility, Technical and Financial Components

Checklist for Eligibility and Technical Components

COMPANY: _____

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| Control No. : |
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ADDRESS: _____

| ITEM NO. | REQUIREMENTS | PASSED | FAILED |
|----------|--|--------|--------|
| | ELIGIBILITY AND TECHNICAL DOCUMENTS | | |
| | A. Eligibility Documents | | |
| | Legal Documents | | |
| A | Updated PhilGEPS Platinum Certificate of Registration with Annex A | | |
| B | Registration Certificate (SEC, DTI or CDA) | | |
| C | CY 2019 Mayor's/ Business Permit or its equivalent document for EEZ areas | | |
| D | Tax Clearance per Executive Order 398, series of 2005, as finally reviewed and approved by the BIR | | |
| E | Tax payer's Identification number or VAT registration for the type & cost of contract to be bid /// TIN | | |
| | Technical Documents | | |
| F | <p>A. Statement of the prospective Bidder of all its ongoing government and private contracts within three (3) years from bid submission, if any, whether similar or not similar in nature and complexity to the contract to be bid (SF-INFR-15).</p> <p>This statement shall be supported with:</p> <ol style="list-style-type: none"> 1) Notice of Award and/or Contract; 2) Notice to Proceed issued by the owner; and 3) Certificate of Accomplishments signed by the owner or Project Engineer. | | |
| G | <p>b. Statement identifying the bidder's Single Largest Completed Contracts (SLCC) similar to the contract to be bid.</p> <p>This statement (of the Bidder's SLCC) shall be supported with:</p> <ol style="list-style-type: none"> 1) Notice of Award and/or Notice to Proceed; 2) Signed Contract and/or Certificate of Completion; and 3) Project Owner's Certificate of Final Acceptance issued by the Owner other than the Contractor or the Contractors Performance Evaluation Summary (CPES) Final Rating, which must be at least satisfactory. In case of contracts with the private sector, an equivalent document shall be submitted. <p>The two statements (a & b) required shall indicate for each contract the following:</p> <ol style="list-style-type: none"> a) name of the contract; b) date of the contract; c) contract duration; d) owner's name and address; e) nature of work; f) contractor's role (whether sole contractor, subcontractor, or partner in a JV) and percentage of participation; g) total contract value at award; h) date of completion or estimated completion time; i) total contract value at completion, if applicable; j) percentages of planned and actual accomplishments, if applicable; k) value of outstanding works, if applicable; | | |

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Kalinga State University
PROCUREMENT MANAGEMENT OFFICE
 Checklist for Eligibility Screening

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| Doc. Ref. No.: | KSU-PMO-07 |
| Effectivity Date: | January 3, 2019 |
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| H | <p>A valid Philippine Contractors Accreditation Board (PCAB) license and registration for Size Range – Small B, License Category C & D, Principal Classification as General Engineering/General Building, and should be valid at the time of the deadline for the submission and opening of bids. The submission of a PCAB license with validity period after the date of the opening of the bids is a ground for the prospective bidder's disqualification (SF-INFR-09).</p> <p>*The Terms and Conditions (Page 2) of the PCAB license should be attached.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|---------------------|--------------------|---------------------|-----------------|---------|---------|------------------|---------|---------|--|--------|---------|---|---------|---------|--------------------|---------|---------|--|---------|---------|---|---------|---------|--|---------|---------|---------|---------|---------|--|--|
| | Financial Documents | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| I | Audited Financial Statements, showing, among others, the prospective bidder's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the immediately preceding calendar year which should not be earlier than two (2) years from the date of bid submission. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| J | NFCC computation of which the <i>K factor shall be <u>fixed at 15</u>, regardless of contract duration, and the values of the domestic bidder's current assets and current liabilities shall be based on the latest Audited Financial Statements submitted to the BIR. // NFCC = Php</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | B. Technical Documents -- | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| K | Duly signed PROJECT REQUIREMENTS, which shall include the following: 1) Organizational chart for the contract to be bid (SF-INFR-44); | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| L | 2) <input type="checkbox"/> List of Construction Personnel to be assigned to the contract to be bid, with their complete qualification and experience data (SF-INFR-48), as follows: <table border="1" style="margin-left: 40px;"> <thead> <tr> <th>Key Personnel</th> <th>General Experience</th> <th>Relevant Experience</th> </tr> </thead> <tbody> <tr> <td>Project Manager</td> <td>3 years</td> <td>3 years</td> </tr> <tr> <td>Project Engineer</td> <td>3 years</td> <td>3 years</td> </tr> <tr> <td>Mechanical Engineer or Electro-mechanical Engineer</td> <td>1 year</td> <td>3 years</td> </tr> <tr> <td>Structural Engineer and/or Civil Engineer</td> <td>3 years</td> <td>3 years</td> </tr> <tr> <td>Materials Engineer</td> <td>3 years</td> <td>3 years</td> </tr> <tr> <td>Professional and/or Registered Electrical Engineer</td> <td>3 years</td> <td>3 years</td> </tr> <tr> <td>Sanitary Engineer and/or Master Plumber</td> <td>3 years</td> <td>3 years</td> </tr> <tr> <td>Construction Safety and Health Officer</td> <td>3 years</td> <td>3 years</td> </tr> <tr> <td>Foreman</td> <td>3 years</td> <td>3 years</td> </tr> </tbody> </table> <input type="checkbox"/> Key Personnel's Bio-data (SF-INFR-47); <input type="checkbox"/> Key Personnel's Certificate of Employment (SF-INFR-46); | Key Personnel | General Experience | Relevant Experience | Project Manager | 3 years | 3 years | Project Engineer | 3 years | 3 years | Mechanical Engineer or Electro-mechanical Engineer | 1 year | 3 years | Structural Engineer and/or Civil Engineer | 3 years | 3 years | Materials Engineer | 3 years | 3 years | Professional and/or Registered Electrical Engineer | 3 years | 3 years | Sanitary Engineer and/or Master Plumber | 3 years | 3 years | Construction Safety and Health Officer | 3 years | 3 years | Foreman | 3 years | 3 years | | |
| Key Personnel | General Experience | Relevant Experience | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Project Manager | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Project Engineer | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Mechanical Engineer or Electro-mechanical Engineer | 1 year | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Structural Engineer and/or Civil Engineer | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Materials Engineer | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Professional and/or Registered Electrical Engineer | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sanitary Engineer and/or Master Plumber | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Construction Safety and Health Officer | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Foreman | 3 years | 3 years | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| M | 3) Construction Manpower utilization schedule (SF-INFR-42); | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| N | 4) Construction schedule and S-Curve/ PERT/CPM (SF-INFR-41); | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| O | 5) Construction Methods in narrative form (SF-INFR-43); | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| P | 6) Statement of Availability of Key Personnel and Equipment (SF-INFR-18); | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Q | 7) Construction Equipment utilization schedule (SF-INFR-50); | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| R | 8) List of contractor's major equipment units, which are owned, leased, and/or under purchase agreements, supported by Proof of Ownership or Certification of Availability of Equipment from the equipment lessor/vendor for the duration of the project (SF-INFR-49); <table border="1" style="margin-left: 40px;"> <thead> <tr> <th>Equipment</th> <th>Capacity</th> <th>Number of Units</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> | Equipment | Capacity | Number of Units | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Equipment | Capacity | Number of Units | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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|--|---|-----------|----|--|--|--|
| | Electric Drill with Adaptor | | 1 | | | |
| | Welding Machine | | 1 | | | |
| | Disk Grinder/Cutter | | 1 | | | |
| | Excavator | 0.80 cu.m | 1 | | | |
| | H-frames/GI Pipe Scaffolds | | 46 | | | |
| | Speed Cutter | | 1 | | | |
| | Bar Bender | | 1 | | | |
| | Mixing Box | | 1 | | | |
| | Minor Tools | | 1 | | | |
| | Power and Hand Tools | | 1 | | | |
| | Portable Concrete Vibrator | | 1 | | | |
| | One-Bagger Mixer | | 1 | | | |
| | Plainer | | 1 | | | |
| S | Duly signed statement of the prospective bidder (OMNIBUS SWORN STATEMENT , that: | | | | | |
| | 1. Signatory is proprietor/duly authorized representative of bidder. | | | | | |
| | 2. Full power and authority to perform acts or represent bidder. | | | | | |
| | 3. Not "blacklisted" or barred from bidding | | | | | |
| | 4. Each document is authentic copy of original, complete, and correct. | | | | | |
| | 5. Authorizing Head of Procuring Entity to verify all documents submitted. | | | | | |
| | 6. Not related to HOPE, BAC, TWG, Secretariat, PMO/IU, within 3rd civil degree. | | | | | |
| | 7. Complies with existing labor laws and standards. | | | | | |
| | 8. Aware of and undertaken responsibilities as a bidder. | | | | | |
| 9. Did not give any commission, amount, fee, or consideration. | | | | | | |
| T | Authority of the signatory, which read as follows: | | | | | |
| | <p><i>"Ensuring that the signatory is the duly authorized representative of the Bidder, and granted full power and authority to do, execute and perform any and all acts necessary and/or to represent the Bidder in the bidding, with the duly notarized Secretary's Certificate attesting to such fact, if the Bidder is a corporation, partnership, cooperative, or joint venture"</i></p> <p>Note: The Authorized Representative shall be the same personnel who is reflected in the documents of the Company submitted to PCAB.</p> | | | | | |

- Note:**
1. Technical Documents shall be book bounded and with Ear-Tabbing for each Checklist above. Ring bounded is not acceptable and shall be marked as "non-complying".
 2. Contents of which must be all numbered/paginated consecutively in the right-hand top margin and signed below page number by the duly authorized representative.
 3. Any missing, incomplete or patently insufficient document in the above-mentioned checklist is a ground for outright rejection (non-complying) of the bid.

CHECKED BY: _____

TWG/BAC MEMBER's Name and Signature: _____

DATE: _____

REMARKS: Eligible Non-Eligible

Checklist for Financial Component

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COMPANY: _____

ADDRESS: _____

| ITEM NO. | REQUIREMENTS | COMPLYING | NON-COMPLYING |
|----------|--|-----------|---------------|
| | Financial Documents (Second Envelope) | | |
| A | Duly signed Bid Prices in the Bill of Quantities (lump sum bid prices), which shall include the detailed engineering cost. (SF-INFR-55). | | |
| B | Duly signed SUMMARY OF ESTIMATES supported by signed DETAILED ESTIMATES indicating the unit prices of construction materials, labor rates and equipment rentals used in coming up with the bid. | | |
| C | Duly signed Cash Flow or Payment Schedule | | |

Note:

1. Financial Documents shall be book bounded and with Ear-Tabbing for each Checklist above. Ring bounded is not acceptable and shall be marked as "non-complying".
2. Contents of which must be all numbered/paginated consecutively in the right-hand top margin and signed below page number by the duly authorized representative.
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CHECKED BY:

TWG/BAC MEMBER's Name and Signature: _____

DATE: _____

REMARKS:

Complying

Non-Complying

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