

Section III. Bid Data Sheet

Procurement of Real Estate Appraisal Services

Bid Data Sheet

ITB Clause	
1.1	<p>The Procuring Entity is <i>National Home Mortgage Finance Corporation</i></p> <p>The evaluation procedure is Quality Cost Based Evaluation/Selection (QCBE/QCBS)</p> <p><i>QCBE/QCBS – (GOP and WB) Technical and Financial Scores are combined to determine the winner. ABC and the maximum rates for appraisal are stated and Financial Proposal above these rates are rejected except in the case of WB, no ABC or cost estimate is included in the Bidding Documents except for an estimate of the staff months required to complete the Project.</i></p>
1.2	<p>The Funding Source is <i>the Board approved Corporate Operating Budget for CY 2017.</i></p> <p>The name of the project is <i>“Procurement of Real Estate Appraisal Services”</i>.</p>
1.3	<p>The name of the project is <u><i>Procurement of Real Estate Appraisal Services.</i></u></p> <p>The project entails the winning bidder to:</p> <ol style="list-style-type: none"> a. Conduct ocular inspection of the property and ascertain its physical state insofar as the same affects its value; b. Conduct appropriate and diligent research on the value of the property through inquiries with banks, real estate property brokers, listings of recent properties for sale, sold, or published thru classified ads and thru the internet; c. Verification and disclosure on the following: <ul style="list-style-type: none"> • Presence of road or legal right-of-way; • Exact location of the property through physical inspection or investigation with appropriate government agencies dealing with real property such as the Assessor’s Office, Tax Mapping Office, Land Registration Authority (LRA), Department of Environment and Natural Resources (DENR) or any other agency that ascertains the legal, physical existence, and exact location of real properties; • Encroachment on or of the property subject of appraisal, if obvious, including improvements thereon;

	<ul style="list-style-type: none"> • Existence and availability of basic service utilities such as water, electricity, transportation, road networks, etc.; • History of severity of flooding caused by rainfall and other causes either natural or man-made; • Presence of informal settlers either within the property itself or its immediate vicinity; • Topography and elevation of the property with respect to road level; • Land erosions particularly for properties bounded by bodies of water; • Presence of waterways, canal or other similar structures that run through or bounds the property; and • If located within the fault line's five (5)-meter buffer zone. <p>d. Generation of Appraisal Report in Short Form. A template shall be provided as basis for purposes of uniformity in the presentation of data (see Appendix "A"). However, the winning bidder may opt to use their own template for ease of computation of values as long as the data fields indicated in the attached NHMFC template are all represented and filled out, which may differ only in format with that of their suggested template and other enhancements, if any.</p> <p>Aside from the appraisal report in short form, an appraisal report in narrative form is also required per subdivision/project, together with a summary of appraisal values of each property inspected per subdivision/project, and an outline of specification for site development and house models as basis of appraisal values for HLRPP accounts.</p> <p>Moreover, soft copies of both the short and narrative forms of appraisal report are also required for submission;</p> <p>e. Generation of a Vicinity/Location Map of the subject property indicating the landmarks near the subject property, if any, for BIDA-NPL and AAD accounts. However, such is no longer needed for properties under the HLRPP, since it is already one of the requirements for application to the program and is being provided by the project proponent.</p> <p>f. Photographs of the subject property showing the façade and interior of the housing unit, side and rear views of the unit, and view of the street where the property is abutted/situated should be provided. Under the HLRPP, photographs of land development including amenities of the subdivision should also be provided.</p>
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	<p>g. For purposes of place marking the account in the NHMFC Geographical Mapping System, GPS coordinate readings (latitude and longitude) on at least one (1) corner of the property that is directly abutting the servicing road is also required. However, this requirement may or may not be provided by the Bidder. In case where the bidder is not equipped with a GPS receiver unit or is not in any manner capable of providing such requirement (geographical coordinates), said bidder must explicitly indicate it in the Technical Proposal Form, TPF-4 “Description of Methodology and Work Plan for Performing the Project”, i.e., <i>“not capable of providing GPS coordinate readings”</i>, or <i>“includes the provision of GPS coordinate readings”</i>, if otherwise. For this reason, an additional 3 points on top of the total rating garnered from the Technical Proposal will be given to Bidder(s) who will provide the said requirement.</p>
1.4	The Project shall not be phased.
5	No further instructions.
6.1	Subcontracting is not allowed.
6.2	“Not applicable”.
7	The NHMFC will hold a pre-bid conference on <i>July 18, 2017, Tuesday at 10:00 a.m.</i> at the NHMFC Board Room, 5/F Filomena Building III, 104 Amorsolo Street, Legaspi Village, Makati City.
8.1	<p>The NHMFC’s address is:</p> <p>NATIONAL HOME MORTGAGE FINANCE CORPORATION FILOMENA BUILDING III, 104 AMORSOLO STREET, LEGASPI VILLAGE, MAKATI CITY</p> <p>Contact Person: ATTY. ERIKA KATHRYN FERNANDEZ-AGUAS Head, BAC Secretariat (02) 8931501 local 370 nhmfc.bacsec@gmail.com</p>
10.1(b)	Not applicable
10.1(c)	<p>The NHMFC is looking for a reputable Appraisal Company with the following qualifications:</p> <ul style="list-style-type: none"> a. Must have at least five (5) years of experience in real estate appraisal; b. BSP accreditation is an advantage/plus factor;

	<p>c. Must have undertaken similar projects/contracts with private or government agencies;</p> <p>d. Must have a roster of licensed real estate appraisers in the organization, which is sufficient for nationwide coverage, in order to provide cost-effective and timely appraisal services for properties located in most parts of the country.</p> <p>Bidders must submit a curriculum vitae for each appraiser/member of the team who will undertake the project and a photocopy of the PRC ID for licensed appraisers.</p> <p>Likewise, bidders must indicate if there are changes in the line-up of appraisers who will undertake the project during the bidding process or during the period within which the contract is already in effect;</p> <p>e. All appraisers that are included in the roster of the organization must be in good standing or has been affirmed and sworn to by the Bidder that said appraisers have no derogatory record and/or said appraisers are in good standing.</p>																		
10.2(c)(i)	(TPF 2) Not Applicable.																		
10.2(c)(ii)	(TPF 3) Not Applicable.																		
10.2(c)(vii)	(TPF 7) Not Applicable.																		
11.2	The financial Proposal requires completion of FPF1 and FPF2 only.																		
11.3	Not Applicable. The Transportation and Out-of-Pocket Expenses (TOPE) shall be part of the proposed rates per item under Section V of the Terms of Reference.																		
11.5	Taxes: The Approved Budget for the Contract is inclusive of all applicable taxes.																		
11.7	<p>The Approved Budget for the Contract (ABC) shall be FIVE MILLION SEVEN HUNDRED FIFTY THOUSAND (Php 5,750,000.00) inclusive of all applicable taxes. The ABC represents the maximum amount that the winning bidder may be paid for the services rendered and will be sourced from corporate funds. The payment of which shall be based on the winning bid proposal for the rate of each account, but should not exceed the rates enumerated herein, to wit:</p> <table border="1" data-bbox="440 1717 1396 1858"> <thead> <tr> <th>TYPE OF ACCT. AREA</th> <th>NCR</th> <th>OUTSKIRTS OF NCR</th> <th>LUZON</th> <th>VISAYAS</th> <th>MINDANAO</th> </tr> </thead> <tbody> <tr> <td colspan="6">BIDA-NPL/ AAD Accounts</td> </tr> <tr> <td colspan="6" style="text-align: center;">Lot with Improvement</td> </tr> </tbody> </table>	TYPE OF ACCT. AREA	NCR	OUTSKIRTS OF NCR	LUZON	VISAYAS	MINDANAO	BIDA-NPL/ AAD Accounts						Lot with Improvement					
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Lot with Improvement																			

	First lot	Base Fee	4,500.00	4,500.00	4,500.00	4,500.00	4,500.00
	Per succeeding lot within same subdivision	Base Fee	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00
Lot Only							
	First Lot	Base Fee	2,800.00	2,800.00	2,800.00	2,800.00	2,800.00
	Per succeeding lot within same subdivision		1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
TOPE*							
	For assignment with minimum of 5 up to 10 accts per province		-	1,120.00	1,120.00	1,120.00	1,120.00
HLRPP Accounts							
	Preliminary Appraisal per project/condominium project (1 model only)	Base Fee	5,100.00	5,100.00	5,100.00	5,100.00	5,100.00
	Per succeeding model w/in the same project		2,500.00	2,500.00	2,500.00	2,500.00	2,500.00
	Per account (with borrower) after pre-appraisal		1,120.00	1,120.00	1,120.00	1,120.00	1,120.00
	TOPE*	For assignment with minimum of 3	-	1,120.00	1,120.00	1,120.00	1,120.00

	<table border="1"> <tr> <td>project s per provinc e</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p style="text-align: center;">*TOPE : Transportation and Out-of-Pocket Expenses *Outskirts of NCR include Bulacan, Cavite, and Laguna</p> <p>Any bid with a financial component exceeding these amounts shall not be accepted.</p>	project s per provinc e						
project s per provinc e								
13.1	The bid prices shall be quoted in Philippine Pesos.							
13.3	No further instructions.							
14.1	Bids will be valid for a period of 120 days from bid opening or until November 22, 2017 .							
15.1	<p>The bid security shall be in the following amount:</p> <ol style="list-style-type: none"> 1. <i>One Hundred Fourteen Thousand Pesos (Php114,000.00)</i>, if bid security is in cash, cashier's/manager's check, bank draft/guarantee or irrevocable letter of credit; 2. <i>Two Hundred Eighty-Five Thousand Pesos (Php285,000.00)</i>, if bid security is in Surety Bond; or 3. Any combination of the foregoing proportionate to the share of form with respect to total amount of security. <p style="text-align: center;">Or</p> <ol style="list-style-type: none"> 4. Bid Securing Declaration. 							
15.2	The bid security shall be valid until November 22, 2017 .							
15.5(a)(iv)	<p><i>If the Funding Source is GOP or WB, maintain the ITB clause and include the following as additional grounds for forfeiture of bid security:</i></p> <ol style="list-style-type: none"> 1. Submission of eligibility requirements containing false information or falsified documents. 2. Submission of bids that contain false information or falsified documents, or the concealment of such information in the bids in order to influence the outcome of eligibility screening or any other stage of the public bidding. 3. Allowing the use of one's name, or using the name of another for purposes of public bidding. 							

	<ol style="list-style-type: none"> 4. Withdrawal of a bid, or refusal to accept an award, or enter into contract with the Government without justifiable cause, after the Bidder had been adjudged as having submitted the Lowest Calculated and Responsive Bid. 5. Refusal or failure to post the required performance security within the prescribed time. 6. Refusal to clarify or validate in writing its bid during post-qualification within a period of seven (7) calendar days from receipt of the request for clarification. 7. Any documented unsolicited attempt by a bidder to unduly influence the outcome of the bidding in his favor. 8. Failure of the potential joint venture partners to enter into the joint venture after the bid is declared as successful. 9. All other acts that tend to defeat the purpose of the competitive bidding, such as habitually withdrawing from bidding, submitting late Bids or patently insufficient bid, for at least three (3) times within a year, except for valid reasons.
15.5(b)(iii)	No further instructions.
17.1	No further instructions.
17.3	Each Bidder shall submit <i>[ONE]</i> original and <i>[THREE]</i> copies of the first and second components of its bid.
18	<p>The address for submission of bids is:</p> <p>ATTY. SIEGFRID ERIC G. LAPASARAN C/O BAC SECRETARIAT NATIONAL HOME MORTGAGE FINANCE CORPORATION 5/F, FILOMENA BUILDING III, 104 AMORSOLO STREET LEGASPI VILLAGE, MAKATI CITY</p> <p>The deadline for submission of bids is on <i>August 1, 2017 at 10:00 in the morning.</i></p> <p>To synchronize all bid activities for this Project, the official time clock to be used by the BAC shall be the wall clock located at the Reception Area, Ground Floor, Filomena Building III, 104 Amorsolo St., Legaspi Village, Makati City.</p>

21.2	<p>The address for opening of bids is <i>at the NHMFC Board Room, 5/F, Filomena Bldg. III, 104 Amorsolo St., Legaspi Village, Makati City.</i></p> <p>The date and time for opening of technical bids is <i>August 01, 2017 at 10:00 a.m., while opening of financial bids is on August 08, 2017 at 10:00 a.m.</i></p>										
22.1	No further instructions.										
25.1	<p>The following processes for the opening and evaluation of bids shall be adopted:</p> <p>a) The technical proposal together with the financial proposal shall be considered in the evaluation of consultants. The technical proposals shall be evaluated first using the criteria in ITB Clause Error! Reference source not found. The financial proposals of the consultants who meet the minimum technical score shall then be opened.</p> <p>b) The financial and technical proposals shall be given corresponding weights with the financial proposal given a minimum weight of fifteen percent (15%) up to a maximum of forty percent (40%). The weight of the technical criteria shall be adjusted accordingly such that their total weight in percent together with the weight given to the financial proposal shall add to one hundred percent (100%). The BAC shall rank the consultants in descending order based on the combined numerical ratings of their technical and financial proposals and identify the Highest Rated Bid.</p> <p>c) The Head of the Procuring Entity shall approve or disapprove the recommendations of the BAC within two (2) calendar days after receipt of the results of the evaluation from the BAC.</p> <p>d) After approval by the Head of the Procuring Entity of the Highest Rated Bid, the BAC shall, within three (3) calendar days, notify and invite the consultant with the Highest Rated Bid for negotiation in accordance with ITB Clause Error! Reference source not found.7.</p>										
25.3	<p>The minimum required St for each criterion is as follows:</p> <table border="1" data-bbox="440 1583 1393 1881"> <thead> <tr> <th data-bbox="440 1583 1167 1623">Criterion</th> <th data-bbox="1167 1583 1393 1623">Score</th> </tr> </thead> <tbody> <tr> <td data-bbox="440 1623 1167 1663">Firm's Experience Related to the Assignment</td> <td data-bbox="1167 1623 1393 1663">40%</td> </tr> <tr> <td data-bbox="440 1663 1167 1736">Qualification and Competence of Staff Assigned to the Project</td> <td data-bbox="1167 1663 1393 1736">45%</td> </tr> <tr> <td data-bbox="440 1736 1167 1850">Description of Methodology, Work Plan with Time Table showing efficiency and conformity/responsiveness to the TOR.</td> <td data-bbox="1167 1736 1393 1850">15%</td> </tr> <tr> <td data-bbox="440 1850 1167 1881" style="text-align: center;">Total</td> <td data-bbox="1167 1850 1393 1881" style="text-align: center;">100%</td> </tr> </tbody> </table>	Criterion	Score	Firm's Experience Related to the Assignment	40%	Qualification and Competence of Staff Assigned to the Project	45%	Description of Methodology, Work Plan with Time Table showing efficiency and conformity/responsiveness to the TOR.	15%	Total	100%
Criterion	Score										
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Total	100%										

	<p><i>Additional three (3) points shall be given to bidders who will comply with the GPS reading requirement and five (5) points for bidders with BSP Accreditation on top of their total score for the Technical Proposal.</i></p> <p>The minimum St required to pass is <i>[70%]</i>.</p>
26.1	<p>The place of bid opening is at the NHMFC Board Room, 5/F, Filomena Bldg. III, 104 Amorsolo Street, Legaspi Village, Makati City.</p> <p>The date and time of bid opening of the Technical Proposal is July 26, 2017, at 10:00 in the morning.</p> <p>The date and time of bid opening of the Financial Proposal is on August 01, 2017, at 10:00 in the morning.</p>
26.2	<p><i>For Quality Cost Based Evaluation (QCBE):</i> After the evaluation of quality is completed, the Procuring Entity shall notify those Consultants whose Bids did not meet the minimum qualifying mark or were considered non-responsive to the Bidding Documents and TOR, indicating that their Financial Proposals shall be returned unopened after completing the selection process. The Procuring Entity shall simultaneously notify the Consultants that have secured the minimum qualifying mark, indicating the date and time set for opening the Financial Proposals. The opening date shall not be sooner than two weeks after the notification date unless otherwise specified in ITB Clause 26.1. The notification may be sent by registered letter, facsimile, or electronic mail.</p> <p>The Financial Proposals shall be opened publicly in the presence of the Consultants' representatives who choose to attend. The name of the Consultant, the quality scores, and the proposed prices shall be read aloud and recorded when the Financial Proposals are opened. The Procuring Entity shall prepare minutes of the public opening.</p> <p>The BAC shall determine whether the Financial Proposals are complete, <i>i.e.</i>, whether all the documents mentioned in ITB Clause 11 are present and all items of the corresponding Technical Proposals that are required to be priced are so priced. If not, the Procuring Entity shall reject the proposal. The BAC shall correct any computational errors, and convert prices in various currencies to the Philippine Peso at the rate indicated in ITB Clause 13. The Financial Proposal shall not exceed the ABC and shall be deemed to include the cost of all taxes, duties, fees, levies, and other charges imposed under the applicable laws. The evaluation shall include all such taxes, duties, fees, levies, and other charges imposed under the applicable laws; where special tax privileges are granted to a particular class or nationality of Consultant by virtue of the GOP's international commitments, the amount of such tax privileges shall be included in the Financial Proposal for purposes of comparative evaluation of Bids.</p>

The lowest Financial Proposal (F1) shall be given a Financial Score (Sf) of 100 points. The Sf of other Financial Proposals shall be computed based on the formula indicated below:

$$Sf = 100 \times F1/F$$

Where:

Sf is the financial score of the Financial Proposal under consideration,

F1 is the lowest Financial Proposal, and

F is the price of the Financial Proposal under consideration.

Using the formula $S = S_E \times E\% + S_T \times T\% + S_f \times F\%$, the Bids shall then be ranked according to their combined S_E , S_T , and S_f using the weights (E= the weight given to the Eligibility Proposal; T = the weight given to the Technical Proposal; F = the weight given to the Financial Proposal; $E + T + F = 1$) indicated below:

E 0.10

T 0.60 [Normally between 0.6 and 0.85]; and

F 0.30 [Normally between 0.15 and 0.4];

provided that the total weights given to the Eligibility, Technical and Financial Proposals shall add up to 1.0.

For Quality Cost Based Selection (QCBS):

Adopt paragraphs 1, 2, and 4 of the provision for QCBE above and replace paragraph 3 thereof with the following:

The BAC shall determine whether the Financial Proposals are complete, *i.e.*, whether all the documents mentioned in **ITB** Clause 11 are present and all items of the corresponding Technical Proposals that are required to be priced are so priced. If not, the Procuring Entity shall reject the Bid. The BAC shall correct any computational errors, and convert prices in various currencies to the Philippine Peso at the rate indicated in **ITB** 13. The Financial Proposal shall be deemed to *include* the cost of all taxes, duties, fees, levies, and other charges imposed under the applicable laws. The evaluation shall *include* all such taxes, duties, fees, levies, and other charges imposed under the applicable laws; where special tax privileges are granted to a particular class or nationality of the Consultant by virtue of the GOP's international commitments, the amount of such tax privileges shall be included in the Financial Proposal for purposes of comparative evaluation of Bids.

27.1	<p>The address for negotiations is:</p> <p>NHMFC – Board Room 5th Floor Filomena Bldg. 104 Amoroso Street Legaspi Village, Makati City</p>
27.2(e)	No negotiations pertaining to the Financial Proposal shall be undertaken.
28.2	No additional requirement.
31.4.6	No additional requirement.
32.1	No further instructions.
33.2	The effective date of the contract is by August 2017.