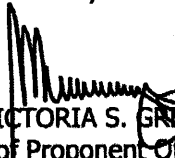
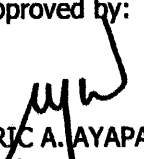



## NOTICE OF CORRECTION

All is hereby informed that correction has been made to the following document as described herein:

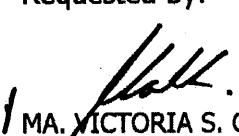


Document Title: <b>D.O no. 64 series of 2025</b>			
Criteria and Scoring System for Shortlisting and Technical Evaluation of Bids for Locally-funded Consulting Services Projects			
Proponent Office: Procurement Service			
Date of Document Issuance: April 03, 2025			
Correction			
Location (page # / Annex, etc.)	Before Correction	After Correction	Reason
Annex B, Item I, Page 1	<b>Score I</b> = $\left[0.60 + \frac{4}{30} \times \left(\frac{TR}{10} - 1\right)\right] \times 60$	<b>Score I</b> = $\left[0.60 + \frac{4}{30} \times \left(\frac{TR}{10} - 1\right)\right] \times 10$	Oversight
<i>Proponent office hereby attests that the corrections indicated above were the only changes made to the document.</i>			
Requested by:  MA. VICTORIA S. GREGORIO Head of Proponent Office Date:			
Approved by:  ERIC A. AYAPANA Undersecretary for Operations In-Charge of Convergence Projects BACCS Chairman Date:			
Noted by:  MARICHU A. PALAFOX Undersecretary for Support Services Chairperson, Policies and Procedures Review Committee Date:			

Series No.: 2025 - 001



## NOTICE OF CORRECTION

All is hereby informed that correction has been made to the following document as described herein:

Document Title: <b>D.O no. 64 series of 2025</b>			
Criteria and Scoring System for Shortlisting and Technical Evaluation of Bids for Locally-funded Consulting Services Projects			
Proponent Office: Procurement Service			
Date of Document Issuance: April 03, 2025			
<b>Correction</b>			
Location (page # / Annex, etc.)	Before Correction	After Correction	Reason
Annex B, Item I, Note 1, Page 1	<i>Note:</i> 1. <i>If the firm or firm's principal or key staff has not completed any similar contract the firm shall not be considered for shortlisting.</i>	<i>Note:</i> 1. <i>If the firm or firm's principal or key staff has not completed any similar contract the firm shall not be considered for <b>evaluation</b>.</i>	Oversight
Annex B, Item I, Table 1, Page 2	Table 1. Completed Similar Services and Infrastructure Contracts to be Considered in the Shortlisting of Eligible Firms	Table 1. Completed Similar Services and Infrastructure Contracts to be Considered in the <b>Evaluation of Shortlisted Bidders</b>	Oversight
Proponent office hereby attests that the corrections indicated above were the only changes made to the document.			
Requested by:   MA. VICTORIA S. GREGORIO Head of Proponent Office Date:			
Approved by:   ERICA A. AYAPANA Undersecretary for Operations In-Charge of Convergence Projects BACCS Chairman Date:			
Noted by:   MARICHU R. PALAFOX Undersecretary for Support Services Chairperson, Policies and Procedures Review Committee Date:			

Series No.: 2025 - 003



APR 03 2025

Republic of the Philippines  
DEPARTMENT OF PUBLIC WORKS AND HIGHWAYS  
**OFFICE OF THE SECRETARY**  
Bonifacio Drive, Port Area Manila



BAGONG PILIPINAS

097.13 DPWH

04.04.2025

DEPARTMENT ORDER )

**SUBJECT: Criteria and Scoring System for  
Shortlisting and Technical Evaluation of  
Bids for Locally-Funded Consulting  
Services Projects**

No. 64 )  
Series of 2025 )  
4/4/2025

In line with the Department's continuous effort to establish a more structured and objective oriented framework for assessing the qualifications, capabilities, and experience of a consultant in compliance with ISO 9001:2015, Clause 8.2.2 (Determining Requirements for Products and Services) and Section 24.5.3 and 32.2.2 of the 2016 Revised Implementing Rules and Regulations (RIRR) of Republic Act No. 9184 (R.A. 9184), the Department of Public Works and Highways (DPWH) hereby adopts the herein detailed and comprehensive guidelines, criteria, and rating system for shortlisting and technical evaluation of bids which set the standards that encompass all necessary and relevant aspects in the selection of qualified consultants for locally-funded consulting services projects.

This revised guidelines aims to ensure close alignment with the specific objectives and requirements of the project. As project goals evolve or become more refined, the evaluation criteria of the Department shall also be adjusted accordingly to prioritize attributes that are most critical to achieving project success.

Finally, the concerned BAC, TWG, and the Procurement Service shall conduct cascading of this policy as part of the training on R.A. 9184 and its 2016 RIRR to assist all DPWH offices (Central Office, RO and DEO) in their respective procurement activities.

This Order supersedes Department Order No. 143, Series of 2022, dated June 23, 2022 and other previous issuances to the contrary and shall take effect immediately.

  
**MANUEL M. BONOAN**  
Secretary

Department of Public Works and Highways  
Office of the Secretary



WIN5AB00315

12.1 MVSG/MAP

- Encl:
- Annex A- Criteria and Rating System for the Shortlisting of Eligible Bidders
  - Annex B- Criteria and Rating System for the Technical Evaluation of Bids for Shortlisted Bidders
  - Annex C- Completed Similar Services to be considered
  - Annex D- Completed similar Infrastructure to be considered

## 1.0 Objective

The Revised Guidelines, Criteria, and Rating System aims to provide clearer and more specific instructions to avoid contradictory or conflicting requirements and ensure a cohesive framework for the conduct of evaluation. It also ensures that the evaluation is aligned with current needs and objectives by providing the most effective way of rating consultants using appropriate analytical techniques to come up with quality results.

## 2.0 Scope

This document shall apply to all Locally-Funded Consulting Services Projects procured through Competitive Bidding, Alternative Methods of Procurement, Limited Source Bidding and Negotiated Procurement e.g., Two Failed Biddings, Emergency Cases, Take-Over of Contracts, Adjacent or Contiguous and Small Value Procurement. Moreover, this new guidelines, criteria and rating system shall be used specifically for shortlisting and technical evaluation of bids.

## 3.0 Definition of Terms

- **Consulting Services.** Refers to services for infrastructure projects and other types of projects or activities of the GoP requiring adequate external technical and professional expertise that are beyond the capability and/or capacity of the GoP to undertake such as, but not limited to: (i) advisory and review services; (ii) pre-investment or feasibility studies; (iii) design; (iv) construction supervision; (v) management and related services; and (vi) other technical services or special studies.
- **Bidder.** Refers to consultant/s who submits a bid in response to the requirements of the Bidding Documents.
- **Criteria.** Refers to specific standards, principles, or conditions used to evaluate and/or assess the quality, suitability, or capacity of a firm or an individual.
- **Shortlisting.** Refers to the process of narrowing down a list of consultants or prospective bidders. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed criteria and rating system.
- **Technical Evaluation.** Refers to the assessment and analysis of the technical aspects of proposals submitted by bidders. This evaluation focuses on the bidder's capabilities, expertise, and proposed technical approach relevant to the project or contract being considered. Technical evaluation is a crucial step in the overall bidding process, particularly for projects involving complex technical requirements or specifications.
- **Passing Score.** Refers to a predetermined threshold that bidders must meet to be considered eligible or qualified for a particular contract or project. The passing score, in this case, is the minimum overall score that a bidder must achieve to move forward in the evaluation process.

## 4.0 Procedure

### 4.1 Preparation of Criteria and Rating System for Shortlisting of Eligible Firms (Annex A)

This criteria is in accordance with Section 24.5.3 of the Revised Implementing Rules and Regulations (RIRR) of Republic Act (R.A.) 9184. Annex A shall be a mandatory requirement for the conduct of Pre-Procurement Conference (PPC) by the Bids and Awards Committee for Consulting Services (BACCS).

#### 4.1.1 Contents of Annex A:

##### Item I. Experience of the Firm

The Implementing Unit (IU) shall indicate the Approved Budget for the Contract (ABC) or the Estimated Project Cost (EPC) of the project. Accordingly, the IU shall modify the increments of the cost of completed contracts as a percentage of the ABC or EPC. This modification ensures that the evaluation criteria are aligned with the project's financial scope. Use the formula indicated in Score I.

In Table 1, to determine which of the submitted projects will be considered for the evaluation of the applicable experience of the firms, reference can be made to **Annex C** (Completed Similar Service to be considered) and **Annex D** (Completed Similar Infrastructure to be considered).

##### Item II. Availability of Required Personnel of the Firm

The score in this item is equivalent to the number of Principal and Key Staff in comparison to the Technical Personnel required in the Terms of Reference (TOR). (Use the formula indicated in Score II)

##### Item III. Current Workload Relative to Capacity (Use the formula indicated in Score III)

- a. On-going Contracts – based on the on-going workload of the firm  
(Use the formula indicated in Score III.A)
- b. Financial Capacity – ratio of average total net worth within the last two (2) years to the cost of the ABC (Use the formula indicated in Score III.B)

#### 4.1.2 Scoring System

The allowable passing score for the shortlisting evaluation shall be **60 points**. However, if no firm meet this passing score, the **top three (3)** firms will still be considered eligible, provided they have scores not lower than 50 points.

#### 4.1.3 Deliberation and Approval

The BACCS will then deliberate on and approve the Criteria and Rating System for Shortlisting of Eligible Firms submitted by the IU. After approval, the criteria will be signed by the BACCS Chairman. This approval must be secured prior to the opening of the eligibility documents and shortlisting proposals submitted by prospective bidder/s.

The BACCS and/or its Technical Working Group (TWG), along with a representative from the IU, will only begin the shortlisting evaluation after the criteria have been deliberated upon and approved by the BACCS Chairman.

## **4.2 Preparation of Criteria and Rating System for the Technical Evaluation of Bids (Annex B)**

This criteria is consistent with Section 32.2.2 of the Revised Implementing Rules and Regulations (RIRR) of Republic Act (R.A.) 9184. The submission and preparation of Annex B is likewise mandatory during the conduct of Pre-Procurement Conference (PPC) by the Bids and Awards Committee for Consulting Services (BACCS).

### **4.2.1 Contents of Annex B:**

#### **Item I. Experience of the Firm**

The Implementing Unit (IU) shall indicate the Approved Budget for the Contract (ABC) or the Estimated Project Cost (EPC) of the project. Accordingly, the IU shall modify the increments of the cost of completed contracts as a percentage of the ABC or EPC. This modification ensures that the evaluation criteria are aligned with the project's financial scope. (Use the formula indicated in Score I).

To determine which of the submitted projects will be considered for the evaluation of the applicable experience of the firms, reference can be made to **Annex C** (Completed Similar Service to be considered) and **Annex D** (Completed Similar Infrastructure to be considered).

#### **Item II. Qualification of Proposed Key Personnel (Use the formula indicated in Score II)**

- **Assigning Weights to Key Personnel:**

The IU shall propose percentage weights (%) to all required key personnel. These weights should be based on the remuneration of the position as indicated in the approved ABC.

- **Enumerating Professional Qualifications:**

The IU shall propose all required professional qualifications for the key personnel, including their education, training, and publications. These qualifications must be fully aligned with the specifications outlined in the approved TOR. (Use the formula indicated in Score II.A)

- **Indicating Similar and Related Experience:**

The IU shall propose the required similar experience and maximum years of experience for each key personnel. If the experience is not directly similar, it should be classified as related experience. (Use the formula indicated in Score II.A)

**Note:**

All proposed percentage weights, professional qualifications, and required experience shall be subject to the deliberation and approval of the BACCS.

Item III. Methodology  
(Use the formula indicated in Score III)

In this item, firms shall be evaluated based on the following criteria, each with corresponding points:

Item III.A – Clarity, Feasibility, Innovativeness and Comprehensiveness  
(Use the formula indicated in Score III.A)

Item III.B – Quality of Interpretation of project problems, risk, and suggested solutions (Use the formula indicated in Score III.B)

#### 4.2.2 Scoring System

For **Quality-Based Evaluation/Selection (QBE/S)**, the passing score for technical evaluation will be determined by the BACCS during the PPC. For **Quality-Cost Based Evaluation/Selection (QCBE/S)\***, the technical score and combined weights\*\* for the Technical Proposal and Financial Proposal will also be determined by the BACCS during the PPC.

The Implementing Unit (IU) can also recommend a passing score to the BACCS based on their experience with previously procured projects.

#### 4.2.3 Deliberation and Approval

The BACCS will then deliberate on and approve the Criteria and Rating System for the Technical Evaluation of Bids submitted by the IU. After approval, the criteria will be signed by the BACCS Chairman. This approval must be secured prior to the opening of the technical proposals submitted by prospective bidder/s.

The BACCS and/or its Technical Working Group (TWG), along with a representative from the Implementing Unit (IU), will only begin the technical evaluation after the criteria have been deliberated upon and approved by the BACCS Chairman.

### 5.0 Alternative Mode of Procurement

Under Alternative Mode of Procurement, the technical passing score will also be determined during the PPC. The mode of Procurement is the one indicated in the Annual Procurement Plan (APP) but in case there is a need to update the mode of procurement, the IU shall recommend to the BACCS, and the BACCS shall decide thereon before the APP may be updated.

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*\*Section 33.2.1.1 (ii) of the 2016 Revised IRR of R.A. states that "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 exact weights shall be approved by the HoPE upon the recommendation of the BAC and indicated in the Bidding Documents. 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.*

*\*\*Normally, the weight for quality is 80% and 20% for the cost.*

**DETAILED CRITERIA AND RATING SYSTEM FOR SHORTLISTING OF ELIGIBLE FIRMS**

Implementing Office: \_\_\_\_\_

Contract ID No.: \_\_\_\_\_

Contract Name: \_\_\_\_\_

**I. EXPERIENCE OF THE FIRM (60 Points)**

The score for this criterion shall be based on similar work experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firm or, in the case of a *new firm*\*, the individual experiences of the principal and key staff, including the times when employed by other consultants on completed consulting contracts, local or overseas. Contracts with the biggest consultancy cost shall be considered in the evaluation (maximum of 10 contracts).

Cost of Completed Contract as % of ABC or EPC	Rating
[50% or more]	4
[40% to <50%]	3
[30% to <40%]	2
[<30%]	1

**ABC or EPC:** *[insert Approved Budget for the Contract or Estimated Project Cost]*

$$\text{Score I} = \left[ 0.60 + \frac{4}{30} \times \left( \frac{\text{TR}}{10} - 1 \right) \right] \times 60$$

Where:

**TR** - Sum of the total rating*Note:*

1. If the firm or firm's principal or key staff has not completed any similar contract the firm shall not be considered for shortlisting.
2. In case of new firm without similar experience, the total contract cost of the similar experience of the key staff or firm's principal shall be considered.
3. In case of joint venture (JV) or associations' similar experience, the total contract cost of the same shall be considered regardless of the percentage of participation.
4. The similar completed contract cost shall be adjusted using the current Philippine Statistics Authority Consumer Price Index (CPI) as follows:

$$\text{Contract Cost}_{\text{CURRENT YEAR}} = \text{Contract Cost}_{\text{YEAR OF CONTRACT}} \times \frac{(\text{CPI}_{\text{CURRENT YEAR}})}{(\text{CPI}_{\text{YEAR OF CONTRACT}})}$$

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\*new firms – 2 years from the date of BIR registration

5. *In the evaluation of the applicable experience of the firms, the procuring entity shall observe the additional guidelines attached in ANNEX C - Completed Similar Services to be considered and ANNEX D - Completed Similar Infrastructure Contracts to be considered.*

**Table 1. Completed Similar Services and Infrastructure Contracts to be Considered in the Shortlisting of Eligible Firms**

Services	Infrastructure
[ refer to ANNEX C ]	[ refer to ANNEX D ]

## **II. AVAILABILITY OF REQUIRED PERSONNEL OF THE FIRM (10 Points)**

The score in this criterion shall be equivalent to the number of Principal and Key Staff of the firm in comparison to the required Technical Personnel of the Terms of Reference (TOR), using the following criterion:

$$\text{Score II} = [0.60 + PF * 0.40] \times 10$$

Where:

- PF** - Personnel Factor, Ratio of Number of Key Staff to the Number of Required personnel of the TOR
- $\frac{N_p}{N_T}$
- N<sub>p</sub>** - Number of Key Staff of the firms
- N<sub>T</sub>** - Number of required Technical Personnel as indicated in the TOR

*Note:*

- 1. The value of the ratio (N<sub>p</sub>/N<sub>T</sub>) shall not exceed one (1). The maximum allowable points for this criterion shall not exceed ten (10) points.*
- 2. In case of JV, the total number of Key Staff shall be the sum of Key Staff of all the firms comprising the JV*

### III. CURRENT WORKLOAD RELATIVE TO CAPACITY (30 Points)

#### A. ON-GOING CONTRACTS (20 Points)

The score in this criterion shall be based on the on-going workload of the firm. In case of Joint Venture (JV), the total workload shall be the sum of the present workload of all the firms comprising the JV:

No. of On-Going Contracts, Government and Private	Rating
0	100%
1-5	90%
6-10	70%
>10	50%

$$\text{Score III.A} = (\% \text{ Rating}) \times 20$$

*Note:*

*Non-disclosure of on-going contracts/current workloads is a ground for disqualification and shall be dealt with in accordance to Section 69 of the Revised Implementing Rules and Regulations of Republic Act 9184.*

#### B. FINANCIAL CAPACITY (10 Points)

The financial capacity of the firm shall be rated as follows:

$$\text{Financial Capacity} = \left[ \frac{a}{b} \right]$$

Where:

- a** - Average of Total Net Worth within the last two (2) years
- b** - Cost of the Approved Budget for the Contract

$$\text{Score III.B} = (\text{Financial Capacity}) \times 10$$

*Note:*

1. *The value of the ratio of (a/b) shall not exceed to one (1).*
2. *For partners of Joint Venture Agreement (JVA), the Net Worth shall be equivalent to the Total Net Worth of both partners.*
3. *Negative Total Net Worth will be given zero (0) points.*

$$\text{Score III} = \text{Score III.A} + \text{Score III.B}$$

**TOTAL SCORE = Score I + Score II + Score III**

**Passing Score for shortlisting evaluation is 60 points\***

*\*If the passing score is not met, the top five (5) firms will automatically be considered.*

**PREPARED BY:**

**[Name of the Head of the Implementing Unit/Office]**  
[Designation]

**APPROVED BY:**

**[Name of the BAC Chairperson]**  
[Designation]  
Chairperson, Bids and Awards Committee  
[Reference policy that authorized the Chairperson]  
[Date Signed]

**DETAILED CRITERIA AND RATING SYSTEM FOR THE TECHNICAL  
EVALUATION OF BIDS**

Implementing Office: \_\_\_\_\_  
Contract ID No.: \_\_\_\_\_  
Contract Name: \_\_\_\_\_

**I. EXPERIENCE OF THE FIRM (10 Points)**

The score for this criterion shall be based on similar work experience of the consultant and members in case of joint ventures, considering both the overall experiences of the firm or, in the case of a *new firm*\*, the individual experiences of the principal and key staff, including the times when employed by other consultants on completed consulting contracts, local or overseas. Contracts with the biggest consultancy cost shall be considered in the evaluation (maximum of 10 contracts).

Cost of Completed Contract as % of ABC or EPC	Rating
[50% or more]	4
[40% to <50%]	3
[30% to <40%]	2
[<30%]	1

**ABC or EPC:** [insert Approved Budget for the Contract or Estimated Project Cost]

$$\text{Score I} = \left[ 0.60 + \frac{4}{30} \times \left( \frac{\text{TR}}{10} - 1 \right) \right] \times 10$$

Where:

**TR** - Sum of the total rating

*Note:*

1. If the firm or firm's principal or key staff has not completed any similar contract the firm shall not be considered for evaluation.
2. In case of new firm without similar experience, the total contract cost of the similar experience of the key staff or firm's principal shall be considered.
3. In case of joint venture (JV) or associations' similar experience, the total contract cost of the same shall be considered regardless of the percentage of participation.
4. The similar completed contract cost shall be adjusted using the current Philippine Statistics Authority Consumer Price Index (CPI) as follows:

$$\text{Contract Cost}_{\text{CURRENT YEAR}} = \text{Contract Cost}_{\text{YEAR OF CONTRACT}} \times \frac{(\text{CPI}_{\text{CURRENT YEAR}})}{(\text{CPI}_{\text{YEAR OF CONTRACT}})}$$

\*new firms – 2 years from the date of BIR registration

5. In the evaluation of the applicable experience of the firms, the procuring entity shall observe the additional guidelines attached in ANNEX C - Completed Similar Services to be considered and ANNEX D - Completed Similar Infrastructure Contracts to be considered.

**Table 1. Completed Similar Services and Infrastructure Contracts to be Considered in the Evaluation of Shortlisted Bidders**

Services	Infrastructure
[ refer to ANNEX C ]	[ refer to ANNEX D ]

## II. QUALIFICATION OF PROPOSED KEY PERSONNEL (80 Points)

The Implementing Unit (IU) shall assign weights (%) to all required key personnel that will reflect the relative importance of their responsibilities and inputs in the consulting services contract to be procured.

The respective weight percentage of the personnel are the following:

	Position	No. of Personnel	Maximum Points per Personnel	Weight (%) per Personnel	Weight TOTAL
1	Key Personnel No. 1 (Team Leader)				
2	Key Personnel No. 2				
3	Key Personnel No. 3				
4	Key Personnel No. 4				
5	Key Personnel No. n				
	<b>TOTAL</b>	<b>ΣN</b>			<b>100%</b>

**ΣN**= Total Number of Key Personnel

*Note:*

*The assigned weights shall be based on the remuneration of the position indicated in the approved ABC.*

The score for this criterion shall be computed as follows:

**A. Education, Training and Publication (30 Points)**

The educational qualification of the personnel shall be rated as follows:

- a. Allow 80% rating if the personnel have the **required** bachelor's degree;
- b. Add 10% rating for **relevant** Master's degree;
- c. Add 5% rating for **Doctoral** degree and;
- d. Add 1% rating for every 40 aggregate hours of **relevant technical trainings** within the last ten (10) years (maximum of 200 training hours) **or** every **technical** publication/proceeding (maximum of 5 publications) **or** every three (3) units of post – graduate studies or unfinished Master's or Doctoral degree.

The key personnel must have the following minimum educational attainment:

KEY STAFF	PROFESSIONAL QUALIFICATION
Key Personnel No. 1 (Team Leader)	<i>[Insert same requirements indicated in the Terms of Reference (TOR) and in the Bidding Documents (BD)]</i>
Key Personnel No. 2	
Key Personnel No. 3	
Key Personnel No. 4	
Key Personnel No. n	

*Note:*

*The firm shall be disqualified if any of the proposed personnel is found non-complying to the requirements of the TOR and BD (Education, Professional Licensure, Registrations and/or Accreditations).*

$$\text{Individual Score II.A} = \text{Rating} \times 30 \times (\text{Assigned Weight per Personnel})$$

$$\text{Score II. A} = \sum \text{Individual Score II.A}$$

**B. Experience of Key Personnel (50 Points)**

The experience for this criterion shall be based on similar and related consulting services contracts local or overseas, occupying the positions as defined below:

**Definition of "Similar" and "Related" Years of Services of Key Personnel**

Position	Years of Experience (Y <sub>min</sub> )	Similar Experience (Y)	Related Experience (Y <sub>r</sub> )

Position	Similar Experience	Related Experience
P1. Project Manager	P1, same S and same I	P1, same S and different I or P1, different S and same I
P2. Senior Infra Position	P2, same S and same I	P1 or P2, same S and different I or P1 or P2, different S and same I
P3. Other Positions	P3, same S and any I	Any position, any S and any I

*Note:*

*P - Position*

*S - Type of consulting services (e.g., FS, DED, CS, etc. – must be specific to the project)*

*I - Type of infrastructure (e.g., Road, Flood Control, etc. – must be specific to the project)*

$$\text{Individual Score B} = \left[ \left( \frac{PS(Y + 0.25Y_r)}{Y_{\min}(100)} \right) \right] (50)(\text{Wt. per Personnel})$$

*Where:*

- PS** - Passing Score
- Y** - Similar Years of Experience ( $Y \geq Y_{\min}$ )
- Y<sub>r</sub>** - Related Years of Experience
- Y<sub>min</sub>** - Minimum Years of Experience (based on the TOR)

*Note:*

1. *Proposed personnel who have no similar years of experience shall be rated zero in the Individual Score B.*
2. *Proposed personnel who have Y lower than Y<sub>min</sub> shall be rated zero.*
3. *The value of the ratio  $\left( \frac{PS(Y + 0.25Y_r)}{Y_{\min}(100)} \right)$  shall not exceed one (1).*
4. *For non-infrastructure contracts, the IU shall prepare their own set of criteria for the qualification of key personnel subject to the approval of the Bids and Awards Committee.*

$$\text{Score II. B} = \sum \text{Individual Score II. B}$$

$$\text{Score II} = \text{Score II.A} + \text{Score II. B}$$

### **III. METHODOLOGY (10 Points)**

The plan of approach and methodology shall be rated using the following checklist of criterion and corresponding points:

#### **III. A – Clarity, feasibility, innovativeness, and comprehensiveness of the plan approach (8 Points)**

$$\text{Score III.A} = A+B+C+D$$

##### **A. Clarity** - quality of narrative description of the methodology and work plan for performing the services (2 points)

(Score A = a+b)

- a. The description discussed fully all aspects of the Services in the submitted TPF 4 - Description of the Methodology and Work Plan for Performing the Project (1 point).
- b. The work plan is described in proper order of work activities in the submitted TPF 4 – Description of the Methodology and Work Plan for Performing the Project (1 point).

##### **B. Feasibility** – capability to achieve the services (2 points)

(Score B = a+b+c+d).

- a. The proposed team includes all required personnel, and the tasks of each key personnel are clearly defined in TPF5 – Organizational Chart, Team Composition and Tasks for the Project.  
(0.5 point)
- b. The work activities are achievable and given in logical sequence in the submitted TPF5 – Organizational Chart, Team Composition and Tasks for the Project.  
(0.5 point)
- c. The assignment of personnel in TPF7 - Time Schedule of Professional Staff - is consistent with the work activities in TPF5 – Organizational Chart, Team Composition and Tasks for the Project.  
(0.5 point)
- d. Each of the key personnel has letter of commitment to work on the project (i+ii+...n in a total of 0.5 point).  
Key Personnel No. 1  
Key Personnel No. 2  
Key Personnel No. 3  
Key Personnel No. n

**C. Innovativeness** - adoption of quality standard/new work approach technology/tools  
(2 points) (Score C=a+b+c+d).

- a. There is innovation with discussion on how the methodology will enhance the quality of work outputs and/or ensure timely completion of the Services in TPF 4 - Description of the Methodology and Work Plan.  
(0.5 point)
- b. The methodology completely describes the technology and tools to be used in TPF 4 - Description of the Methodology and Work Plan  
(0.5 point)
- c. Flexibility of the proposed Methodology  
(0.5 point)
- d. Adaptability of the proposed Methodology  
(0.5 point)

**D. Comprehensiveness** - completeness and adequate detail of the work plan as to how the Services will be carried out as outlined in the Terms of Reference (2 points)  
(Score D= a+b+c+d).

- a. All works required in the Services are covered in TPF7 - Time Schedule of Professional Staff  
(0.5 point)
- b. All the required key personnel are covered in TPF5 – Organizational Chart, Team Composition and Tasks for the Project  
(0.5 point)
- c. There is a clear presentation of interdependence of activities, such as bar chart, as shown in TPF 4 - Description of the Methodology and Work Plan and TPF7 - Time Schedule of Professional Staff  
(0.5 point)
- d. The work plan integrates interactions of the firm, with the concerned DPWH Offices, LGUs, and other government agencies, in TPF 4 - Description of the Methodology and Work Plan for performing the services and in TPF7 - Time Schedule of Professional Staff  
(0.5 point)

**III. B – Quality of Interpretation of project problems, risks, & suggested solutions  
(2 points)**

**Score III.B = A+B**

- A. There is clear discussion on possible problems and risks based on actual site inspection in TPF 4 - Description of the Methodology and Work Plan  
(1 point)
- B. Appropriateness of suggested solutions - achievability of suggested solutions to the problems and risks (1 point)  
(Score B = a+b)
- a. The suggested solutions are logical and practicable in the submitted TPF 3- Comments and Suggestions of Consultant on the Terms of Reference and on data, services, and facilities to be provided by the Procuring Entity.  
(0.5 point)
  - b. There is a clear discussion on how the proposed solutions shall be carried out in the submitted TPF 3. Comments and Suggestions of Consultant on the Terms of Reference and on data, services, and facilities to be provided by the Procuring Entity and/or TPF 4 - Description of the Methodology and Work Plan.  
(0.5 point)

**Score III = Score III.A + Score III.B**

**TOTAL SCORE = Score I + Score II + Score III**

**PREPARED BY:**

**[Name of the Head of the Implementing Unit/Office]**  
[Designation]

**APPROVED BY:**

**[Name of the BAC Chairperson]**  
[Designation]  
Chairperson, Bids and Awards Committee  
[Reference policy that authorized the Chairperson]  
[Date Signed]

<b>COMPLETED SIMILAR SERVICES TO BE CONSIDERED</b>	
<b>Services to be Procured</b>	<b>Completed SIMILAR SERVICES</b>
Subsurface Explorations (Geological and Geotechnical Investigation)	<ol style="list-style-type: none"> <li>1. Subsurface Explorations (Geological and Geotechnical Investigation)</li> <li>2. Geotechnical Investigation/Surveys</li> <li>3. Soil Exploration/Investigation (Including Sub-surface Soil Exploration)</li> <li>4. Feasibility Study (FS) if Soil Investigations are included therein</li> <li>5. Preliminary Engineering Design (PED) if Soil Investigations are included therein</li> <li>6. Detailed Engineering Design (DED) if Soil Investigations are included therein</li> <li>7. Geohazard Assessment if Soil Investigations are included therein</li> </ol>
Parcellary Surveys	<ol style="list-style-type: none"> <li>1. Parcellary Surveys</li> <li>2. Detailed Engineering Design (DED) if Parcellary Surveys are included therein</li> <li>3. Preparation of Parcellary Plans</li> <li>4. Geodetic Engineering Surveys if Parcellary Surveys are included therein</li> <li>5. Alignment Study</li> </ol>
Topographic/Hydrographic Surveys	<ol style="list-style-type: none"> <li>1. Topographic/Hydrographic Surveys</li> <li>2. Feasibility Study (FS) if Topographic Surveys are included therein</li> <li>3. Detailed Engineering Design (DED) if Topographic/Hydrographic Surveys are included therein</li> <li>4. Preparation of Topographic/Bathymetric Maps</li> <li>5. Alignment Study</li> </ol>
Master Plan Preparation	<ol style="list-style-type: none"> <li>1. Master Plan Preparation</li> <li>2. Feasibility Studies</li> <li>3. Urban Planning</li> <li>4. Comprehensive Land Use Plan</li> </ol>
Transaction Advisory Services	<ol style="list-style-type: none"> <li>1. Transaction Advisory Services</li> <li>2. Pre-Feasibility Study</li> <li>3. Feasibility Study</li> <li>4. Master Plan</li> <li>5. Independent Consultancy</li> </ol>
Business Case Study	<ol style="list-style-type: none"> <li>1. Business Case Study</li> <li>2. Pre-Investment Studies</li> <li>3. Feasibility Studies</li> </ol>

Feasibility Study	<ol style="list-style-type: none"> <li>1. Feasibility Study</li> <li>2. Business Case Study</li> <li>3. Master Plan</li> <li>4. Urban Planning</li> <li>5. Pre-Investment Studies</li> <li>6. Preparatory Surveys</li> </ol>
Preliminary Engineering Design (PED)	<ol style="list-style-type: none"> <li>1. Preliminary Engineering Design (PED)</li> <li>2. Feasibility Studies with PED</li> <li>3. Pre-Design Services which include but are not limited to reconnaissance, topographical and other engineering and land surveys, soil investigations, preparation of preliminary architectural/engineering designs, layouts, outline specifications, preliminary cost estimates and specific recommendations prior to actual design (Annex B of 2016 IRR of RA 9184)</li> <li>4. Detailed Engineering Design (DED)</li> <li>5. Conceptual Design</li> </ol>
Detailed Engineering Design (DED)	<ol style="list-style-type: none"> <li>1. Detailed Engineering Design (DED)</li> <li>2. Detailed Architectural and Engineering Design (Buildings Only)</li> <li>3. Conceptual Design (For Design and Build Projects)</li> </ol>
Structural Investigation, Analysis and/or Design	<ol style="list-style-type: none"> <li>1. Structural Investigation, Analysis and/or Design</li> <li>2. Detailed Engineering Design with Structural Investigation, Analysis and/or Design</li> <li>3. Special Studies/Technical Assistance and/or Advisory Services involving Structural Investigation, Analysis and/or Design</li> <li>4. Retrofitting/Structural Strengthening including structural investigation</li> </ol>
Detailed Architectural and Engineering Design (DAED)	<ol style="list-style-type: none"> <li>1. Detailed Architectural and Engineering Design (DAED)</li> <li>2. Special Studies/Technical Assistance and/or Advisory Services involving Structural and/or Architectural Investigation, Analysis and/or Design</li> <li>3. Special Studies/Technical Assistance and/or Advisory Services involving Environmental Impact Assessment and/or Mitigation Planning for Construction Projects</li> </ol>
Construction Supervision	<ol style="list-style-type: none"> <li>1. Construction Supervision</li> <li>2. Project/Construction Management Services</li> <li>3. Independent Consultant for Construction Supervision</li> <li>4. Total Quality Management (TQM) Services in Construction</li> </ol>
Independent Consultant	<ol style="list-style-type: none"> <li>1. Independent Consultant</li> </ol>

	2. Detailed Engineering Design and Construction Supervision
Independent Design Checker	1. Independent Design Checker 2. Detailed Engineering Design 3. Detailed Architectural and Engineering Design (Buildings)
Retrofitting	1. Retrofitting 2. Structural and/or Architectural Rehabilitation Works involving Investigation and Analysis 3. Special Studies/Technical Assistance and/or Advisory Services involving Investigation, Analysis, Preservation, Restoration and/or Rehabilitation of Structural and/or Architectural Works and/or Fire Protection Works and/or Electrical Works and/or improving the energy efficiency of existing buildings, in compliance with Presidential Decree (PD) 1096 and in accordance with the Green Building Code, Guidelines in Energy Conserving for Design of Buildings and other applicable rules and regulations. 4. Structural Strengthening
Quality Assurance/Quality Control	1. Quality Assurance/Quality Control 2. Construction Supervision 3. Construction Quality Management Services 4. Total Quality Management (TQM) Services in Construction
External Monitoring	1. External Monitoring 2. Social and Environmental Impact Study 3. Right-of-Way Action Plan/ Resettlement Action Plan
Preparation of Environmental and Social Impact Assessment/ Gender and Development Plan/ Indigenous People's Plan	1. Preparation of Environmental and Social Impact Assessment/ Gender and Development Plan/ Indigenous People's Plan 2. Feasibility Study 3. Detailed Engineering Design if Preparation of Environmental and Social Impact Assessment/ Gender and Development Plan/ Indigenous People's Plan is included 4. Gender and Development Action Plan 5. Gender Equality Disability and Social Inclusion Action Plan 6. Environmental Impact Statement
Right-of-Way Action Plan/ Resettlement Action Plan	1. Right-of-Way Action Plan/ Resettlement Action Plan 2. Feasibility Study

	<ol style="list-style-type: none"> <li>3. Detailed Engineering Design with Right-of-Way/Resettlement Action Plan</li> <li>4. Environmental and Social Impact Study</li> </ol>
Preparation and Updating an Operational Manual	<ol style="list-style-type: none"> <li>1. Preparation and Updating an Operational Manual</li> <li>2. Operation Manual on Social and Environmental Management (e.g. Roads and Bridges, Highways/Expressways, Flood Management, and other Infrastructure Projects)</li> </ol>
Transportation and/or Traffic Impact Assessment (TIA)	<ol style="list-style-type: none"> <li>1. Transportation and/or Traffic Impact Assessment (TIA)</li> <li>2. Traffic Engineering Study and other Traffic Studies</li> <li>3. Feasibility Studies with Traffic Engineering Studies</li> <li>4. Institutional Development related to Traffic Impact assessment and/or Traffic Engineering</li> <li>5. Governance and Policy Studies related to Traffic Impact Assessment and/or Traffic Engineering</li> </ol>
Technical and/or Feasibility Studies/Policy Formulation and/or Evaluation of Freight Transport Planning and Management	<ol style="list-style-type: none"> <li>1. Technical and/or Feasibility Studies/Policy Formulation and/or Evaluation of Freight Transport Planning and Management</li> <li>2. Highway or Transportation Engineering/Planning of roads/bridges</li> <li>3. Traffic Engineering, Urban Planning, Transport Economics, or Freight and Logistics Planning of roads/bridges</li> <li>4. Research/Policy Formulation related to Transportation Sector of roads/bridges</li> </ol>

**Note:**

For other consulting services not indicated on the first column of the tables above (Infrastructure Contracts in Consulting Services and Services to be Procured) the Implementing Unit (IU) shall adopt a list of similar consulting services to be considered on shortlisting, deemed as appropriate/necessary subject to the approval by the Bids and Awards Committee (BAC).

<b>COMPLETED SIMILAR INFRASTRUCTURE CONTRACTS TO BE CONSIDERED</b>	
<b>Infrastructure Contracts in Consulting Services to be Procured</b>	<b>Completed Similar Infrastructure Contracts</b>
Roads	<ol style="list-style-type: none"> <li>1. Highway</li> <li>2. Expressways</li> <li>3. Toll ways</li> <li>4. Airport Runway/Taxiway/Apron</li> <li>5. Underpass</li> <li>6. Road Tunnel</li> <li>7. By-pass/Diversion Road</li> </ol>
Bridge	<ol style="list-style-type: none"> <li>1. Flyover</li> <li>2. Viaduct</li> <li>3. Interchange</li> <li>4. Wharf/Pier/Jetty/Ports (with concrete piles)</li> <li>5. Elevated Railway</li> <li>6. Elevated Highway</li> </ol>
Tunnel	<ol style="list-style-type: none"> <li>1. Subway</li> <li>2. Mining Tunnel</li> <li>3. Subsurface Aqueducts</li> <li>4. Underpass</li> </ol>
River works	<ol style="list-style-type: none"> <li>1. Revetment/River Walls/ Slope Protection</li> <li>2. Dike/Levees/Embankment</li> <li>3. Spur Dike</li> <li>4. Ground Sill</li> <li>5. Floodway/ Diversion Channel</li> <li>6. Small Dams</li> <li>7. Dredging/Desilting</li> <li>8. Cut-off Channel</li> <li>9. Sediment Control</li> </ol>
Urban Drainage	<ol style="list-style-type: none"> <li>1. Pumping Stations</li> <li>2. Floodgates</li> <li>3. Sluiceways</li> <li>4. Drainage System (Canals, Culverts, Pipes)</li> <li>5. Irrigation Canals and Drainage</li> </ol>
Coastal Protection	<ol style="list-style-type: none"> <li>1. Seawall</li> <li>2. Groins</li> <li>3. Coastal Dikes</li> <li>4. Breakwater</li> <li>5. Causeway</li> <li>6. Jetty</li> <li>7. Dams</li> </ol>
Slope Protection	<ol style="list-style-type: none"> <li>1. Slope Protection Works (Gabions, MSE, etc.)</li> <li>2. Rock fall Protection (Active/Passive)</li> <li>3. Shot Crete Works</li> </ol>

Water Supply	<ol style="list-style-type: none"> <li>1. Dike</li> <li>2. Water Impounding</li> <li>3. Detention/Retarding Basin</li> <li>4. Irrigation Dams</li> <li>5. Hydroelectric Power Dams</li> <li>6. Reservoir</li> <li>7. Water Works System</li> <li>8. Water Source Development</li> <li>9. Water Treatment System</li> </ol>
Buildings	<ol style="list-style-type: none"> <li>1. School</li> <li>2. Hospital</li> <li>3. Housing Projects</li> <li>4. Commercial/Office Buildings</li> <li>5. Industrial Buildings</li> <li>6. Warehouse</li> <li>7. Multi-purpose Building</li> <li>8. Markets</li> <li>9. Residential Towers</li> <li>10. Cultural and Recreational Facilities</li> <li>11. Sports Complexes and Stadiums</li> <li>12. Convention Centers</li> <li>13. Retail and Shopping Centers</li> <li>14. Transportation Hubs and Terminals</li> <li>15. Museums and Art Galleries</li> <li>18. Data Centers</li> <li>19. Multi-level Parking Lots</li> <li>20. Auditoriums</li> </ol>
Sewerage and Septage	<ol style="list-style-type: none"> <li>1. Water Supply and/or Sanitation Projects</li> <li>2. Urban Drainage and Drainage System</li> <li>3. Water Treatment Plants</li> <li>4. Wastewater Facilities/Treatment Plants</li> <li>5. Sewage Treatment Plants</li> </ol>

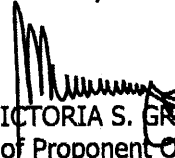
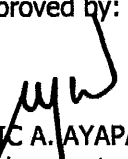

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## NOTICE OF CORRECTION

All is hereby informed that correction has been made to the following document as described herein:

Document Title:  Criteria and Scoring System for Shortlisting and Technical Evaluation of Bids for Locally-funded Consulting Services Projects			
Proponent Office: Procurement Service			
Date of Document Issuance: April 03, 2025			
Correction			
Location (page # / Annex, etc.)	Before Correction	After Correction	Reason
Annex B, Item I, Page 1	$\text{Score I} = \left[ 0.60 + \frac{4}{30} \times \left( \frac{\text{TR}}{10} - 1 \right) \right] \times 60$	$\text{Score I} = \left[ 0.60 + \frac{4}{30} \times \left( \frac{\text{TR}}{10} - 1 \right) \right] \times 10$	Oversight
Proponent office hereby attests that the corrections indicated above were the only changes made to the document.			
Requested by:   MA. VICTORIA S. GREGORIO Head of Proponent Office Date:			
Approved by:   ERIC A. AYAPANA Undersecretary for Operations In-Charge of Convergence Projects BACCS Chairman Date:			
Noted by:   MARICHU A. PALAFOX Undersecretary for Support Services Chairperson, Policies and Procedures Review Committee Date:			

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