

## Section III. Bid Data Sheet

### Procurement of Real Estate Appraisal Services

## Bid Data Sheet

ITB Clause	
1.1	<p>The Procuring Entity is <b><i>National Home Mortgage Finance Corporation</i></b></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 <b><i>the Board approved Corporate Operating Budget for CY 2018.</i></b></p> <p>The name of the project is <b><i>“Procurement of Real Estate Appraisal Services”</i></b>.</p>
1.3	<p>The name of the project is <b><u><i>Procurement of Real Estate Appraisal Services.</i></u></b></p> <p>The project entails the winning bidder to:</p> <ol style="list-style-type: none"> <li>a. Conduct ocular inspection of the property and ascertain its physical state insofar as the same affects its value;</li> <li>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;</li> <li>c. Verification and disclosure on the following: <ul style="list-style-type: none"> <li>• Presence of road or legal right-of-way;</li> <li>• 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;</li> <li>• Encroachment on or of the property subject of appraisal, if obvious, including improvements thereon;</li> </ul> </li> </ol>

	<ul style="list-style-type: none"> <li>• Existence and availability of basic service utilities such as water, electricity, transportation, road networks, etc.;</li> <li>• History of severity of flooding caused by rainfall and other causes either natural or man-made;</li> <li>• Presence of informal settlers either within the property itself or its immediate vicinity;</li> <li>• Topography and elevation of the property with respect to road level;</li> <li>• Land erosions particularly for properties bounded by bodies of water;</li> <li>• Presence of waterways, canal or other similar structures that run through or bounds the property; and</li> <li>• If located within the fault line’s five (5)-meter buffer zone.</li> </ul> <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>For HLRPP accounts under Section I.B:</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 specifications for site development and house models as basis of appraisal values.</p> <p>Moreover, soft copies of both the short and narrative forms of appraisal report are also required for submission;</p> <p>For accounts under Section I.A:</p> <p>A. Generation of a Vicinity/Location Map of the subject property indicating the landmarks near the subject property, if any.</p> <p>B. 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.</p> <p>C. 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.</p>
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	<p>For accounts under Section I.B:</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> <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.</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 August 13, 2018, 1:30 pm at the NHMFC Conference Room, 4/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:  MARK NATALIO SUMISIM  Head, BAC Secretariat  (02) 8931501 local ____  <a href="mailto:nhmfc.bacsec@gmail.com">nhmfc.bacsec@gmail.com</a></p>
10.1(b)	Not applicable
10.1(c)	The NHMFC is looking for a reputable Appraisal Companies with the following qualifications:

	<p>A. Must have platinum membership from PhilGeps;</p> <p>B. Must have at least five (5) years of experience in real estate appraisal;</p> <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. Preference is given to companies with region-based appraisers in order to provide cost-effective and timely appraisal services for properties located in most parts of the country.</p> <p>Bidders must submit curriculum vitae for each appraiser/member of the team who will undertake the project and a photocopy of the respective PRC ID for licensed appraisers.</p> <p>Further, the Bidder must indicate in the Team Composition the regional appraiser/member who will be assigned to undertake the appraisal of properties located in different regions, if any,</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 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	A. For accounts under Section I. A

The Approved Budget for the Contract (ABC) is **NINE HUNDRED FORTY-FIVE THOUSAND PESOS (Php 945,000.00)**, inclusive of all applicable taxes and will be sourced from corporate funds.

**B. For accounts under Section I. B**

The Approved Budget for the Contract (ABC) for each account shall not exceed the rates indicated in the table below, inclusive of all applicable taxes and will be sourced from corporate funds. Also, the maximum amount that the two (2) winning bidders may be paid cumulatively for the services rendered shall not exceed **TWELVE MILLION PESOS (Php 12,000,000.00)**. The payment of which shall be based on the proposed rates of the lowest bidder for each account, and the same rates shall also be used as basis for the payment of services of the second to the lowest bidder, but should not exceed the following rates enumerated below:

TYPE OF ACCT. AREA		NCR	OUTSKIRTS OF NCR	LUZON	VISAYAS	MINDANAO
<b>BIDA-NPL/ AAD Accounts</b>						
<b>Lot with Improvement</b>						
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
<b>Lot Only</b>						
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
<b>TOPE*</b>						
For assignment with minimum of 5 up to 10 accts per province		-	1,120.00	1,120.00	1,120.00	1,120.00
<b>HLRPP Accounts</b>						
Preliminary Appraisal per project/condominium project (up to 2models 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/condominium		2,300.00	2,300.00	2,300.00	2,300.00	2,300.00
Per account (with borrower) after pre-appraisal		1,120.00	1,120.00	1,120.00	1,120.00	1,120.00

	<table border="1"> <tr> <td>TOPE*</td> <td>For assignment with minimum of 3 projects per province</td> <td>-</td> <td>1,120.00</td> <td>1,120.00</td> <td>1,120.00</td> <td>1,120.00</td> </tr> </table> <p>*Outskirts of NCR include Bulacan, Cavite, Laguna, and Rizal  *TOPE : Transportation and Out-of-Pocket Expenses  <i>TOPE shall be given only for assignments with a minimum of 5 accounts up to 10 accounts, and for increments of 5 accounts thereafter per province (for BIDA-NPL &amp; AAD Accounts). Also, TOPE shall be given only for assignments with a minimum of 3 projects per province (for HLRPP accounts).</i></p>	TOPE*	For assignment with minimum of 3 projects per province	-	1,120.00	1,120.00	1,120.00	1,120.00
TOPE*	For assignment with minimum of 3 projects per province	-	1,120.00	1,120.00	1,120.00	1,120.00		
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 <b>120 days</b> from bid opening or until _____.							
15.1	<p>The bid security shall be in the following amount:</p> <ol style="list-style-type: none"> <li><i>Two Hundred Fifty-Eight Thousand Nine Hundred Pesos (Php258,900.00)</i>, if bid security is in cash, cashier's/manager's check, bank draft/guarantee or irrevocable letter of credit;</li> <li><i>Six Hundred Forty-Seven Thousand Two Hundred Fifty Pesos (Php647,250.00)</i>, if bid security is in Surety Bond; or</li> <li>Any combination of the foregoing proportionate to the share of form with respect to total amount of security.</li> </ol> <p>Or</p> <ol style="list-style-type: none"> <li>Bid Securing Declaration.</li> </ol>							
15.2	The bid security shall be valid until _____.							
15.5(a)(iv)	<p><i>If the Funding Source is GOP or WB, maintain the <b>ITB</b> clause and include the following as additional grounds for forfeiture of bid security:</i></p> <ol style="list-style-type: none"> <li>Submission of eligibility requirements containing false information or falsified documents.</li> <li>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.</li> </ol>							

	<p>3. Allowing the use of one's name, or using the name of another for purposes of public bidding.</p> <p>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.</p> <p>5. Refusal or failure to post the required performance security within the prescribed time.</p> <p>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.</p> <p>7. Any documented unsolicited attempt by a bidder to unduly influence the outcome of the bidding in his favor.</p> <p>8. Failure of the potential joint venture partners to enter into the joint venture after the bid is declared as successful.</p> <p>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.</p>
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>MARK NATALIO M. SUMISIM  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>September 5, 2018 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,</p>

	Ground Floor, Filomena Building III, 104 Amorsolo St., Legaspi Village, Makati City.						
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 bids is <i>September 5, 2018 at 10:00 in the morning.</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 <b>ITB Clause Error! Reference source not found.</b> 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 <b>ITB Clause Error! Reference source not found.7.</b></p>						
25.3	<p>The minimum required St for each criterion is as follows:</p> <table border="1"> <thead> <tr> <th>Criterion</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>Firm's Experience Related to the Assignment</td> <td>40%</td> </tr> <tr> <td>Qualification and Competence of Staff Assigned to the Project</td> <td>45%</td> </tr> </tbody> </table>	Criterion	Score	Firm's Experience Related to the Assignment	40%	Qualification and Competence of Staff Assigned to the Project	45%
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%
	<b>Total</b>	<b>100%</b>
26.2	<p>The minimum St required to pass is [70%].</p> <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 <b>ITB</b> 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 <b>ITB</b> 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 <b>ITB</b> 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> <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:</p> $Sf = 100 \times F1/F$ <p>Where:</p>	

	<p>Sf is the financial score of the Financial Proposal under consideration, Fl is the lowest Financial Proposal, and F is the price of the Financial Proposal under consideration.</p> <p>Using the formula <math>S = S_E \times E\% + S_T \times T\% + S_F \times F\%</math>, the Bids shall then be ranked according to their combined <math>S_E</math>, <math>S_T</math>, and <math>S_F</math> using the weights (<math>E</math>= the weight given to the Eligibility Proposal; <math>T</math> = the weight given to the Technical Proposal; <math>F</math> = the weight given to the Financial Proposal; <math>E + T + F = 1</math>) indicated below:</p> <p><math>T</math> <u>0.60</u> [Normally between 0.6 and 0.85]; and  <math>F</math> <u>0.40</u> [Normally between 0.15 and 0.4];</p> <p>provided that the total weights given to the Technical and Financial Proposals shall add up to 1.0.</p> <p><i>For Quality Cost Based Selection (QCBS):</i></p> <p><i>Adopt paragraphs 1, 2, and 4 of the provision for QCBE above and replace paragraph 3 thereof with the following:</i></p> <p>The BAC shall determine whether the Financial Proposals are complete, <i>i.e.</i>, whether all the documents mentioned in <b>ITB</b> 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 <b>ITB</b> 13. The Financial Proposal shall be deemed to <i>include</i> the cost of all taxes, duties, fees, levies, and other charges imposed under the applicable laws. The evaluation shall <i>include</i> 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.</p>
27.1	<p>The address for negotiations is:</p> <p><b>NHMFC – Board Room  5<sup>th</sup> Floor Filomena Bldg.  104 Amorsolo Street  Legaspi Village, Makati City</b></p>
27.2(e)	<p>No negotiations pertaining to the Financial Proposal shall be undertaken.</p>

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 <b>October, 2018</b> .