



TERMS OF REFERENCE

I. Title:

Procurement of Consultancy Services for the Conduct of National Electrification Administration Organizational Restructuring

II. Objectives:

The consultant is expected to provide technical expertise on the development, management, and finalization of the National Electrification Administration Organizational Restructuring pursuant to **GCG Memorandum Circular No. 2015-04 (Re-Issued) dated 02 May 2016** and the **Guidebook for Reorganization for GOCCs**.

III. Approved Budget for the Contract (ABC):

The ABC of the contract is Four Million Eight Hundred Thousand Pesos (Php4,800,000.00) inclusive of all applicable taxes, with the following details:

- a. Phase 1: Php2,000,000.00 (chargeable against the FY2023 budget)
- b. Phase 2: Php2,800,000.00 (chargeable against the FY2024 budget)

IV. Scope of Work, Timelines, and Deliverables:

The Consultant shall perform the following activities and complete the deliverables within the given time frame. All outputs should be in hard and soft copies (editable format):

PHASE	ACTIVITIES	OUTPUT	TIMEFRAME
PHASE I (Organizational Assessment, Formulation of the Design Framework and Strategic Action Planning)			
1. Organizational Assessment	<ul style="list-style-type: none"> ○ Review of NEA's mandate, strategic plans, performance indicators and charter statement ○ Interview of NEA's customers/ stakeholders ○ Interview of NEA employees and executives ○ Conduct Maturity Analysis ○ Review Organizational Size and Structure ○ Review NEA's Environment using SWOT and PESTLE analysis ○ Review NEA's Systems and Controls (Scorecards, Service 	a. Current State Assessment Report	45 days
<ul style="list-style-type: none"> a. Current State Assessment (CSA) b. Workforce Analysis and Planning (WAP) 		<ul style="list-style-type: none"> b. Workforce Analysis and Planning Report c. Documentation of Participatory Process such as surveys and focus group discussions (in coordination with NEA's Change Management Team) 	45 days

	<p>Charter, QMS, Best Practices, Manuals, Policies, Value Chain Systems, Support Systems)</p> <ul style="list-style-type: none"> ○ Conduct the following: <ul style="list-style-type: none"> A. Supply Analysis (analysis of existing employee data) B. Demand Analysis (assessment of future workforce needs) C. Gap Analysis (comparison of the results of the supply analysis and demand analysis for the next 5 years) 		
2. Formulation of the Design Framework (DF)	<ul style="list-style-type: none"> ○ Identification of the reorganization's new Scorecard containing Performance Indicators and Targets specifically to measure the success of the reorganization. The output must address the issues identified in the Current State Analysis Report 	Design Framework	30 days
3. Strategic Action Planning (SAP)	<ul style="list-style-type: none"> ○ Design Strategic Action Plan (which includes timeline of implementation, communication plan, and transition plan) 	Strategic Action Plan	30 days
PHASE II (Crafting of Organizational and Staffing Design, Cost-Benefit Analysis, and Revising of Reorganizational Plan)			
4. Crafting of Organizational and Staffing Design <ul style="list-style-type: none"> a. Development of Proposed Organizational Structure and Staffing Pattern (OSSP) b. Career Leveling 	<ul style="list-style-type: none"> ○ Design Organizational Structure (based on organizational units, reporting lines and levels of hierarchy) ○ Design Staffing Pattern (based on organizational unit, position title, career path, job grade, number of plantilla items, parameters for the creation of additional items and qualification standards) ○ Determine NEA's Overall Size (based on 	<ul style="list-style-type: none"> a. Organizational Structure and Staffing Pattern – Career Leveling Master Data (Soft Copy) b. Official Organizational Structure and Staffing Pattern - Career Leveling c. Existing Organizational Structure 	90 days

	<p>company financials, full-time equivalent employees, geographical scope, and business complexity)</p> <ul style="list-style-type: none"> ○ Undertake assignment of career leveling (based on career band, career level, and job grade) 	<ul style="list-style-type: none"> d. Proposed Organizational Structure e. Functional Description of all Organizational Units f. Review of Proposed Job Description (Retained and New) Position Titles g. Branch Model 	
5. Cost-Benefit Analysis (CBA)	<ul style="list-style-type: none"> ○ Computation of the monetary benefits and costs entailed in implementing the Reorganizational Plan 	Cost-Benefit Analysis Report	30 days
Total Number of Days (Items 1-5)			270 days
6. Approval of the Reorganizational Plan by the Governing Board and GCG	<ul style="list-style-type: none"> ○ Submit Reorganization Plan to CMT for Board approval ○ Edit Reorganizational Plan based on Board and GCG recommendation ○ Assist CMT and TWG in any negotiations pertaining to Reorganizational Plan and its components 	Approved Reorganization Plan through Board Resolution and GCG Memorandum Order	<p>Subject to the timeline set by the Governing Board and GCG.</p> <p><i>(Period incurred under this item does not form part of the period for the proposed project)</i></p>

V. Submission of Deliverables:

- a. The Current State Assessment (CSA) Report shall be submitted within forty-five (45) days reckoned from the date of receipt of the Notice to Proceed (NTP).
- b. The Workforce Analysis and Planning (WAP) Report shall be submitted within forty-five (45) days reckoned from the date of receipt of the Certification of Acceptance of CSA.
- c. The Design Framework (DF) Report shall be submitted within thirty (30) days reckoned from the date of receipt of the Certification of Acceptance of WAP.
- d. The Strategic Action Plan (SAP) shall be submitted within thirty (30) days reckoned from the date of receipt of the Certification of Acceptance of DF.
- e. The Organizational and Staffing Design (OSSD) shall be submitted within ninety (90) days reckoned from the date of receipt of the Certification of Acceptance of SAP.

- f. The Cost-Benefit Analysis (CBA) Report shall be submitted within thirty (30) days reckoned from the date of receipt of the Certification of Acceptance of OSSD.
- g. The above deliverables/reports shall be subject to review by NEA and shall be deemed accepted or finalized only upon issuance of Certification of Acceptance within seven (7) working days upon receipt of deliverables.
- h. Extension in submission of the deliverables shall not be allowed except upon a written request submitted to NEA within fifteen (15) days prior to the required date of submission. Where no action was taken on the request for the extension within three (3) days upon receipt, the request/s shall be deemed approved. In any event, the extension shall not be beyond 10 days from the original date of submission.

VI. Minimum Qualifications:

- a. Must be a reputable consulting firm legally established with at least five (5) years of experience in conducting any or all of the following:
 - 1. Organizational development
 - 2. Change management
 - 3. Reorganization/restructuring planning
 - 4. Job leveling

Preferably knowledgeable on the relevant rules and regulations on restructuring set by oversight agencies such as GCG, CSC and DBM, among others.

- b. The Team Leader and Project Team Members must have handled at least three (3) similar engagements with government or private organizations.
- c. Team Leader and Project Team Member/s must possess educational background in human resources, psychology, organizational development, behavioral science, management, or other related fields.
- d. Team Leader and Project Team Member/s must have collectively attended at least 80 hours of relevant and/or related training/s or development program/s within the last five (5) years.

VII. Team composition

- must be composed of **One (1) Team Leader and Three (3) Members.**

VIII. Criteria and Rating System for Shortlisting:

The following documents are required to be submitted:

- a. PhilGEPS Registration.
- b. Registration Certificate from either SEC, DTI for sole proprietorship, or CDA for cooperatives.
- c. Mayor's/Business Permit or BIR Certificate of Registration for Individual consultant.
- d. Tax Clearance as per E.O. 398, s. 2005.
- e. Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period as provided in the Bidding documents. The statement shall include all information required in the Philippine Bidding Documents prescribed by the GPPB.

- f. Statement of the consultant specifying his/her nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions, including their respective curriculum vitae.
 - List of key personnel to be assigned to the contract to be bid, with their complete qualifications and experience data
- g. Audited financial statements, showing among others, the consultant's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission.
- h. Valid joint venture agreement (JVA), in case of a joint venture.

IX. Criteria and Rating System for Shortlisting:

The criteria and rating for shortlisting are:

CRITERIA	MAXIMUM POINTS
1. Experience of the Firm	50
2. Qualifications of Principal (Firm) and Key Personnel	30
3. Current workload relative to capacity	20
Total	100

The Consultant must pass the required minimum score of seventy (70) points to be shortlisted.

1. Experience of the Firm (50%)

Under this item, the Firm/bidder as a company is assessed for the following:

CRITERIA	Points
1.1 Must be in active practice/ operational for at least five (5) years	20
• 4 years	15
• 3 years	10
• 1 -2 years	5
1.2 Must have at least five (5) years of consulting experience in organizational development change management, reorganizational/restructuring planning, and job leveling	20
• 4 years	15
• 3 years	10
• 1 -2 years	5
1.3 Must have at least five (5) years of consulting experience in related fields such as outsourcing analysis, cross-functional teams' implementation, job redesign and role rationalization, leadership development and succession planning, cultural alignment projects, performance measurement and KPI alignment, supply chain optimization, and organizational flattening and rightsizing	10
• 4 years	7.5
• 3 years	5
• 1 -2 years	2.5

2. Qualifications of the Personnel (30%)

CRITERIA	POINTS
1.1 Education	(10%)
Team Leader/ Staff	
- Doctorate	10
- Doctoral units (at least 12 units)	9
- Masteral	8
- Masteral units (at least 12 units)	7
- Graduate of Human Resources and other related fields	6
- Graduate of other degrees	5
1.2 Training	(10%)
- 40 hours	10
- 30-39 hours	8
- 20-29 hours	6
- 10-19 hours	4
- Below 10 hours	2
2. Experience	(10%)
Team Leader	(5%)
- 5 years and more	10
- 4 years	8
- 3 years	6
- 2 years	4
- Below 2 years	2
Project Team Member	(5%)
- 3 years and more	10
- 2 years	8
- 1 year and below	5

3. Current workload relative to capacity (20%)

CRITERIA	Points
1. Status (average % completion) of the ongoing and similar projects for the current and next fiscal year	20
• 91% to 100%	20
• 80% to 90%	18
• 60% to 79%	16
• 40% to 59%	14
• Below 40%	12

X. Bid Evaluation Methodology

In order to determine the consultant with the Highest Rated Bid, NEA shall conduct an evaluation of bids using the Quality-Cost Based Evaluation Procedure (QCBE) in which the Technical and Financial Proposals of the bidders shall be considered. The Technical and Financial Proposals shall be given the corresponding weight as follows:

CRITERIA	POINT SYSTEM
A. Technical Proposal	70
B. Financial Proposal	30
Total	100

XI. The Technical Proposal must include the following:

1. The bid security in the prescribed form, amount, and validity period;
2. Organizational chart for the contract to be bid;
3. List of completed and ongoing projects;
4. Approach, work plan, and schedule;
5. List of key personnel to be assigned to the contract to be bid, with their complete qualification and experience data; and
6. Omnibus Sworn Statement

XII. Evaluation Criteria:

The technical proposal of consultants shall be based on the following criteria and using the corresponding numerical weights:

1. Qualifications of personnel to be assigned to the Project which cover suitability of key personnel to perform the duties for the Project and general qualifications and competence including education and training of the key personnel;
2. Experience and capability of the Consultant which include records of previous engagement and quality of performance in similar and in other projects; relationship with previous and current clients; and, overall work commitments, geographical distribution of current/impending projects and attention to be given by the Consultant. The suitability of the Consultant to the Project shall consider both the overall experiences of the firm and the individual experiences of the principal and key staff including the times when employed by other consultants; and

3. Plan of approach and methodology with emphasis on the clarity, feasibility, innovativeness and comprehensiveness of the plan of approach, and the quality of interpretation of project problems, risks, and suggested solutions.

**INSTRUCTIONS FOR QCBE PROCESS ADOPTING
DETAILED INDIVIDUAL EVALUATION SCORING SYSTEM FOR**

CRITERIA	POINT SYSTEM
1. Qualifications of personnel	50%
2. Applicable Experience	30%
3. Plan of approach and methodology	20%
Total	100%

CRITERIA	POINTS
1. Qualification of personnel	(50%)
1.1 Education	(25%)
- Doctorate	25
- Doctoral units (at least 12 units)	20
- Masteral	16
- Masteral units (at least 12 units)	14
- Graduate of Human Resources and other related fields	12
- Graduate of other degrees	10
1.2 Training	(25%)
- 40 hours	25
- 30-39 hours	20
- 20-29 hours	16
- 10-19 hours	14
- below 10 hours	12

CRITERIA	POINTS
2. Applicable Experience	(30%)
1. Experience of the Firm	(20%)
1.1 Must be in active practice/ operational for at least five (5) years	5
- Below 5 years	3
1.2 Must have at least five (5) years of consulting experience in organizational development change management, reorganizational/restructuring planning and job leveling	10
• 4 years	8
• 3 years	6
• 2 years	4
• 1 year	2
1.3 Must have at least five (5) years of consulting experience in related fields such as outsourcing analysis, cross-functional teams implementation, job redesign and role rationalization, leadership development and succession planning, cultural alignment projects, performance measurement and KPI alignment, supply chain optimization, and organizational flattening and rightsizing	5
• 4 years	4
• 3 years	3
• 2 years	2
• 1 year	1
2. Experience of Personnel	(10%)
Team Leader	(5%)
- 5 years and more	10
- 4 years	8
- 3 years	6
- 2 years	4
- 1 year and below	2
Project Team Member	(5%)
- 3 years and more	10
- 2 years	7
- 1 year and below	3

3. Plan of Approach and Methodology	(20%)
Characteristics	Points
A. Approach and Method	12
In addition to the requirements listed under "Good", important issues are approached in an innovative and efficient way, indicating that the Consultant has understood the overall and detailed issues and problems of the assignment. The Consultant has outstanding knowledge of the project conditions and a deep grasp of solutions depicted through state-of-the-art approaches and knowledge. The proposal details ways to improve the results and the quality of assignment by using advanced approaches, methodologies, and knowledge.	Very Good 12 points
The proposed approach is discussed in detail and the methodology is specifically tailored to the characteristics of the assignment and flexible enough to allow it to adapt to changes that may occur during the execution of the Services.	Good 9 points
The way to carry out the different activities in the TOR is discussed generically by the Consultant. The discussion of the methodology is general and not specifically tailored to the projects. Although suitable, the methodology does not include a discussion on how the Consultant proposes to deal with critical site specific characteristics of the project. No new insights or deep appreciation of the interrelationships of problems and solutions to be provided for the project are added. The discussion indicates an average perception of the project conditions and does not reflect the specific features of the assignment.	Fair 6 points
The methodology to carry out important activities indicated in the TOR is inappropriate or poorly presented, indicating that the Consultant has misunderstood important aspects of the scope of work. The required contents of the TOR are missing or superficially discussed.	Poor 3 points

B. Work Plan	5
In addition to the requirements listed above under "Good," decision points and sequence and timing of activities are very well defined, indicating that the Consultant has optimized the use of resources.	Very Good 5 points
The work plan responds well to the TOR. All important activities are indicated in the activity schedule, and their timing is appropriate and consistent with the assignment outputs. The interrelation among the various activities is realistic and consistent with the proposed approach. There is a fair degree of detail that facilitates understanding of the proposed work plan.	Good 4 points
All key activities are included, but are not detailed. There are minor inconsistencies among timing, assignment outputs, and proposed approach.	Fair 3 points
The activity schedule excludes important tasks. The timing of activities and correlation among them are inconsistent with the approach and methodology.	Poor 2 points

C. Organization and Staffing	3
In addition to the characteristics listed above under "Good," the proposed team is integrated and has good support organization. The organizational chart clearly shows the lines of responsibility and the links between the two parties – NEA and the Consultant. The proposal contains a detailed discussion showing that the Consultant has optimized the deployment and use of the staff with efficiency and economy, based on the proposed logistics.	Very Good 3 points
The organizational chart is complete and there is a detailed definition of duties and responsibilities, staff skills and needs are matched precisely and enjoy good logistical support. Staffing is consistent with both timing and assignment outputs.	Good 2 points
The proposed organization and personnel schedule are not clear and detailed enough failing to use the required formats. The assignment schedule of each staff is not adequate. The organization and staffing arrangement is not responsive to the requirement of the TOR. It is assumed that the required output cannot be appropriately prepared within the period of assignment.	Poor 1 point
Total Score	20%

a. The score for the evaluation of the Technical Proposal are as follows:

$$ST = 70\% \times (QP + Exp + PAM)$$

Where St is the Technical Score

QP is the total point for Qualification of Personnel

Exp is the total point for Experience

PAM is the total point for Plan of Approach and Methodology

b. The score for the evaluation of the Financial Proposal are as follows:

$$SF = 30\% \times (F1/F)$$

Where SF is the Financial Score

F1 is the Financial Proposal

F is the ABC

c. The score of the Consultants will be computed as follows:

$$S = ST + SF$$

Where S is the Total Score

Passing Score: 70%

XIII. Responsibilities of NEA:

NEA shall have the following duties and responsibilities:

- a. Provide counter-part personnel;
- b. Provide access to documents, facilities, office, and personnel upon request of the consultant within office hours where the same has prior request from Consultant.

XIV. Payment

The payment for Phase I of the project shall be chargeable against the 2023 approved COB.

- a. The procuring entity may provide mobilization payment not to exceed 15% of the contract amount subject to submission of written request and irrevocable letter of standby credit of an amount equal to the mobilization payment;
- b. The procuring entity shall pay the contract amount subject to the NEA approved submission of the following:

ACTIVITY	TERMS OF PAYMENT	TIMEFRAME
Phase I		
Mobilization	15%	
Final Report of the Current State Assessment (CSA)	20%	
Work Force Analysis (WFA) Report	20%	
Design Framework	25%	
Strategic Action Plan	20%	
Total	100%	

The payment for Phase II of the project shall be chargeable against the 2024 approved COB.

- a. The procuring entity shall pay the contract amount subject to submission of the following:

ACTIVITY	TERMS OF PAYMENT	TIMEFRAME
Phase II		
Organizational Structure and Staffing Pattern - Career Leveling Master Data (Soft Copy)	15%	
Official Organizational Structure and Staffing Pattern - Career Leveling	15%	
Proposed Organizational Structure	15%	
Functional Description of all Organizational Units	15%	
Review of Proposed Job Description (Retained and New) Position Titles	10%	
Final Report of Cost-Benefit Analysis (CBA)	10%	
Final Approval of the GCG	20%	
Total	100%	

Payments shall be subject to the issuance of Certificate of Acceptance by NEA on the activities undertaken.

XV. Liquidated Damages:

The consultant shall promptly comply with the schedule of deliveries regarding the required submissions. In case of failure to submit within the required time including time extensions duly granted, the consultant shall be liable for liquidated damages

in the amount of 1/10 of 1% of the cost of the projects, for every day of delay until submitted. In no case shall the total sum of liquidated damages exceed ten percent (10%) of the total contract price, in which event the procuring entity concerned may rescind the contract and impose appropriate sanctions over and above the liquidated damages to be paid.

XVI. Data Privacy Act and Non-Disclosure agreements:

The consultant shall conform to the Data Privacy Act and its related issuances, and any or all that the consultant may acquire, create, determine, discover, and submit including but not limited to reports, shall be deemed property of NEA and shall be subject to non-disclosure to any party without the written approval or concurrence of NEA.

TECHNICAL WORKING GROUP:


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Member


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