



REQUEST FOR QUOTATION

The Insurance Commission (IC), through its Bids and Awards Committee (BAC), invites all PhilGEPS-registered suppliers and interested parties to participate and submit their lowest price quotation on the project listed below, subject to the provisions stated in the Terms of Reference (TOR).

NAME OF PROJECT:	Program Facilitators for the Strategic Planning Workshop (SPW) for 2024 (Division and Individual Targets Reformulation and Cascading)
REFERENCE NO. / PURCHASE REQUEST (PR) NO.:	PR No. 2023-11-399
APPROVED BUDGET FOR THE CONTRACT (ABC):	PhP 990,000.00 inclusive of VAT and all other applicable taxes and charges
MODE OF PROCUREMENT:	Negotiated Procurement – Small Value Procurement (Sec. 53.9, Updated 2016 Revised Implementing Rules and Regulations of R.A. No. 9184)
DELIVERY PERIOD:	Within thirty (30) working days upon receipt of Notice to Proceed and Signing of Contract

The sealed quotation may be submitted personally or through e-mail not later than **30 November 2023, 10:00 AM** to the Insurance Commission through the contact information provided below:

Contact Person : **Mr. Mark Franklin M. Sanchez**
IC Planning Officer III
Planning and Management Division

Office Address : 2/F Insurance Commission Building
1071 United Nations Avenue, Ermita, Manila

Telephone Nos. : (+632) 8-523-8461 local 144

E-mail : mfm.sanchez@insurance.gov.ph

GREGORY VINCENT O. FERRER
IC Division Manager
Planning and Management Division

TERMS OF REFERENCE

Program Facilitators for the Strategic Planning Workshop (SPW) for 2024 (Division and Individual Targets Reformulation and Cascading)

I. SCOPE AND JOB SPECIFICATIONS

The prospective facilitators shall submit a quotation inclusive of all requirements relative to the **Conduct and Facilitation of the Strategic Planning Workshop (SPW) for 2024**, with the following specifications:

1. The Strategic Planning is aimed at reformulation the performance indicators based on the agency's overarching plan (Strategic Map; Agency Performance Committee) and aligning the Individual to the Divisional and Functional Group (operational) targets.
2. Participants for the Strategic Planning Workshop (SPW) for 2024 (Division and Individual Targets Reformulation and Cascading) are the Executive Committee (Insurance Commissioner and Deputy Insurance Commissioners), Directors, and Management Committee (Division Managers) and Supervisors and/or next-in-rank. The final number of participants shall be determined upon approval of the Commissioner.
3. The facilitators shall formulate a customized program for the Insurance Commission (IC) specifically on the following:
 - a) Strategic Planning/Positioning;
 - b) Scorecarding/Division and Individual Targets Reformulation; and
 - c) Targets Cascading.
4. The program shall include the following activities:

Activity/ies	Schedule	Participants	Venue
Initial Consultation / Pre-work activities	At least 1-4 weeks prior to the scheduled initial session/workshop	Division Managers, Supervisors	Online / on-site (within or outside Metro Manila)
Strategic Planning Workshop	Minimum two (2) days	Executive Committee, Division Managers, Supervisors	On-site (within or outside Metro Manila)
Write shops	Minimum two (2) days per Functional Group (<i>5 Functional Groups</i>)	Functional Group Heads, Division Managers, Supervisors	On-site
Cascading	Minimum three (3) days	Division Managers, Supervisors, select Rank and File	On-site

5. Facilitators shall integrate inputs/outputs and conduct synthesis at the end of each activity. They shall collect relevant responses from participants during the activities

to formulate a collective idea on achieving IC's targets/objective effective public service and teamwork.

6. Facilitators shall **submit an evaluation report to IC within fifteen (15) days** after the conduct of the Strategic Planning Workshop 2024. Post-workshop meeting/s shall be conducted to discuss the results of the workshop.
7. The program shall begin in December 2023 and may change depending on the availability of IC management/participants. Scheduling of subsequent sessions shall be coordinated with the Planning and Management Division (PMD). Facilitators shall ensure the appropriate interval between sessions. **Notwithstanding, the schedule may be adjusted in cases of force majeure or fortuitous events as described in government procurement rules and regulations or in other justifiable circumstances subject to the approval of the Commissioner.**
8. The price quotation must **include all expenses for program logistics, such as production of workshop materials, communication, per diem, out-of-town fees (transportation and boarding/lodging, as applicable), health and safety mandatories.**
9. A copy of the Program Outline must also be submitted together with the requirements enumerated in Item III (3) herein. Rating factors shall be used in the evaluation of the design and outline of the program vis-à-vis the results of the Needs Analysis and/or IC's requirements (**Annex A: Table of Rating Factors**).

II. SCHEDULE OF REQUIREMENTS

Item	Deliverable	Description	Delivery Schedule	Percentage of Contract Amount
Strategic Planning/Positioning – 18, 19 & 20 December 2023				30%
1	Submission of Assessment Report	Assessment Report, including recommendations on IC's Strategic Plan and how best to recalibrate strategic targets/objectives, as necessary	Within five (5) working days following the conduct of Strategic Planning/Positioning Session	
Scorecarding/Division and Individual Targets Reformulation – 1st Quarter 2024				40%
2	Development of Agency Scorecard	Draft consolidated Agency Balanced Scorecard / Strategy Map and Strategic Objectives based on the inputs of the	Within ten (10) working days following the conduct of the endmost schedule of FG workshop	

Item	Deliverable	Description	Delivery Schedule	Percentage of Contract Amount
		five (5) Functional Groups		
Targets Cascading – 1st Quarter 2024				30%
3	Portfolio of Strategic Performance Commitments	Commitment Portfolio (<i>Functional Group, Divisional, Individual</i>)	Within ten (10) working days following the conduct of the Cascading sessions	

III. GENERAL CONDITIONS

- All entries in the quotation must be typewritten on the company's letterhead, duly signed by the supplier/dealer or its duly authorized representative (***Annex B: Reply Slip***).
- The sealed quotation shall be submitted to IC, together with the following documentary requirements:
 - Certified true copy of the company's PhilGEPS Registration;
 - Certified true copy of the 2023 Mayor's/Business Permit;
 - Certified true copy of the Latest Income/Business Tax Return;
 - Notarized Omnibus Sworn Statement (***Annex C: Omnibus Sworn Statement***);
 - Program Outline.
- Only those with complete documents and received within the deadline shall be evaluated and considered for the project. Quotations over the Approved Budget for the Contract shall likewise be disqualified.
- The sealed quotation may be submitted personally or through e-mail not later than **30 November 2023, 10:00 AM** to the IC through the contact information provided below:

Contact Person : **Mr. Mark Franklin M. Sanchez**
IC Planning Officer III

Office Address : 2/F Insurance Commission Building
1071 United Nations Avenue, Ermita, Manila

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IV. EVALUATION AND SELECTION CRITERIA

Proposals shall be evaluated in accordance with **Annex A: Table of Rating Factors**. The IC reserves the right to reject any or all Quotations/Bids, to annul the procurement process, to reject all Quotations/Bids at any time prior to contract award, without thereby incurring any liability to the affected Bidder(s), and to accept only the offer that is most advantageous to the Government.

V. AWARDING OF CONTRACT

For verification and validation purposes, the bidder with the Lowest Calculated Bid (LCB) shall be required to present the original copies of the following documents, prior to the awarding of the contract:

1. Mayor's Business Permit;
2. Latest Income / Business Tax Return;
3. Proof of PhilGEPS Registration Number; and
4. Notarized Omnibus Sworn Statement.

The quoted price must be valid for one hundred twenty (120) days and should not be subject to change/increase during the implementation of the contract.

VI. COMPLIANCE WITH DATA PRIVACY

The service provider shall ensure compliance with the Data Privacy Act and agrees to hold in confidence any information received by them from the IC during the course of the engagement and further agrees not to disclose such information to any third party unless (a) the IC gives its prior written authorization, (b) applicable laws require the service provider to disclose or otherwise reveal such information, or (c) such information subsequently becomes part of public domain.

VII. PAYMENT TERMS

The payment for the services rendered per Phase shall be made within thirty (30) days upon issuance of the billing statement by the supplier and corresponding Certificate of Satisfactory Service/Acceptance by IC.

Failure to comply with the Terms and Conditions of the Contract will result in the payment of corresponding penalties/liquidated damages based on the Contract Price.

The IC shall not be held liable for any delay in the payment under reasonable and acceptable circumstances.


GREGORY VINCENT O. FERRER
IC Division Manager
Planning and Management Division

ANNEX A: TABLE OF RATING FACTORS

Program Facilitators for the Strategic Planning Workshop (SPW) for 2024 (Division and Individual Targets Reformulation and Cascading)

Name of Service Provider:			
Rating Factors		Weight	Rating
I	Understanding of program objectives	30%	
II	Appropriateness of activities based on IC's requirements	20%	
III	Qualification of facilitators	20%	
IV	Vendor impression	20%	
V	Price offer	10%	
Overall Rating		100%	

Rated by:

Printed Name and Signature
Position Title
Division

ANNEX B: REPLY SLIP

Name of Service Provider : _____
Address : _____
Contact Information : _____
Business Permit No. : _____
Tax Identification No. : _____
PhilGEPS Registration No. : _____

The Insurance Commission invites all registered suppliers and interested parties to participate and submit their price quotation for the **Program Facilitators for the Strategic Planning Workshop (SPW) for 2024 (Division and Individual Targets Reformulation and Cascading)**, subject to the terms and conditions stated in the Terms of Reference (TOR):

Item and Description	Total Cost
Program Facilitators for the Strategic Planning Workshop (SPW) for 2024 including Division and Individual Targets Reformulation and Cascading (P.R. No. 2023- <u>11-399</u>) Note: <ul style="list-style-type: none">• Total Cost should not exceed ABC of Nine Hundred Ninety Thousand Pesos (PhP 990,000.00);• Total Cost is inclusive of 12% VAT and all other applicable taxes and charges.	
Phase 1 (Strategic Planning/Positioning) – 30%	Php
Phase 2 (Scorecarding/Targets Reformulation) – 40%	Php
Phase 3 (Targets Cascading) – 30%	Php
<i>Total:</i>	<i>Php</i>

In compliance with the TOR, the following required valid documents are enclosed:

1. Certified True Copy of Mayor's Business Permit;
2. Certified True Copy of Latest Income / Business Tax Return;
3. Certified True Copy of PhilGEPS Registration; and
4. Notarized Omnibus Sworn Statement.

**Signature over Printed Name of
Supplier/Authorized Representative**

Position/Designation

Date

Omnibus Sworn Statement (Revised)
[shall be submitted with the Bid]

REPUBLIC OF THE PHILIPPINES)
CITY/MUNICIPALITY OF _____) S.S.

AFFIDAVIT

I, [Name of Affiant], of legal age, [Civil Status], [Nationality], and residing at [Address of Affiant], after having been duly sworn in accordance with law, do hereby depose and state that:

1. *[Select one, delete the other:]*

[If a sole proprietorship:] I am the sole proprietor or authorized representative of [Name of Bidder] with office address at [address of Bidder];

[If a partnership, corporation, cooperative, or joint venture:] I am the duly authorized and designated representative of [Name of Bidder] with office address at [address of Bidder];

2. *[Select one, delete the other:]*

[If a sole proprietorship:] As the owner and sole proprietor, or authorized representative of [Name of Bidder], I have full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for [Name of the Project] of the [Name of the Procuring Entity], as shown in the attached duly notarized Special Power of Attorney;

[If a partnership, corporation, cooperative, or joint venture:] I am granted full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for [Name of the Project] of the [Name of the Procuring Entity], as shown in the attached [state title of attached document showing proof of authorization (e.g., duly notarized Secretary's Certificate, Board/Partnership Resolution, or Special Power of Attorney, whichever is applicable)];

3. [Name of Bidder] is not "blacklisted" or barred from bidding by the Government of the Philippines or any of its agencies, offices, corporations, or Local Government Units, foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, **by itself or by relation, membership, association, affiliation, or controlling interest with another blacklisted person or entity as defined and provided for in the Uniform Guidelines on Blacklisting;**

4. Each of the documents submitted in satisfaction of the bidding requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct;

5. [Name of Bidder] is authorizing the Head of the Procuring Entity or its duly authorized representative(s) to verify all the documents submitted;

6. *[Select one, delete the rest:]*

[If a sole proprietorship:] The owner or sole proprietor is not related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

[If a partnership or cooperative:] None of the officers and members of *[Name of Bidder]* is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

[If a corporation or joint venture:] None of the officers, directors, and controlling stockholders of *[Name of Bidder]* is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

7. *[Name of Bidder]* complies with existing labor laws and standards; and
8. *[Name of Bidder]* is aware of and has undertaken the responsibilities as a Bidder in compliance with the Philippine Bidding Documents, which includes:
 - a. Carefully examining all of the Bidding Documents;
 - b. Acknowledging all conditions, local or otherwise, affecting the implementation of the Contract;
 - c. Making an estimate of the facilities available and needed for the contract to be bid, if any; and
 - d. Inquiring or securing Supplemental/Bid Bulletin(s) issued for the *[Name of the Project]*.
9. *[Name of Bidder]* did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel or representative of the government in relation to any procurement project or activity.
10. **In case advance payment was made or given, failure to perform or deliver any of the obligations and undertakings in the contract shall be sufficient grounds to constitute criminal liability for Swindling (Estafa) or the commission of fraud with unfaithfulness or abuse of confidence through misappropriating or converting any payment received by a person or entity under an obligation involving the duty to deliver certain goods or services, to the prejudice of the public and the government of the Philippines pursuant to Article 315 of Act No. 3815 s. 1930, as amended, or the Revised Penal Code.**

IN WITNESS WHEREOF, I have hereunto set my hand this ___ day of ___, 20___ at _____, Philippines.

*[Insert NAME OF BIDDER OR ITS AUTHORIZED
REPRESENTATIVE]*

[Insert signatory's legal capacity]

Affiant

[Jurat]

[Format shall be based on the latest Rules on Notarial Practice]