



Republic of the Philippines
Department of Finance
INSURANCE COMMISSION
1071 United Nations Avenue, Manila



REQUEST FOR QUOTATION

The Insurance Commission (IC) invites all registered suppliers and interested parties to participate and submit their lowest price quotation on the project listed below, subject to the terms and conditions stated in the Terms of Reference (TOR):


NAME OF PROJECT	Conduct and Facilitation of the Mid-Year Performance Review for FY 2025 and Pre-Planning Session
REFERENCE NO./PR NO.	P.R. No. 2025-06-286
APPROVED BUDGET FOR THE CONTRACT (ABC)	Php 570,000.00 inclusive of all applicable taxes and other charges (Quotations/Proposals exceeding this amount shall be disqualified)
MODE OF PROCUREMENT	53.10 Small Value Procurement
INCLUSIONS	<ul style="list-style-type: none">○ Lead facilitator/s, co-facilitators, training assistants○ Preparation of materials and facilitation of pre-, peri-, post-Mid-Year Performance Assessment activities○ Transportation fees/services of the facilitators, assistants, and marshals
DEADLINE OF SUBMISSION OF SEALED QUOTATION/S	June <u>27</u>, 2025

The sealed quotation may be submitted personally or through e-mail not later than **June 27, 2025, 12:00 PM**, to the Insurance Commission through the contact information provided below:

Contact Person: **Ms. Via Katherine DL. Panganiban**
IC Planning Officer I
vkdl.panganiban@insurance.gov.ph
PlanningDiv@insurance.gov.ph

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

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


ATTY. CHERRIE B. BELMONTE-LIM
IC Director II/Officer-In-Charge
Planning and Management Division



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1071 United Nations Avenue, Manila



TERMS OF REFERENCE

Conduct and Facilitation of the Mid-Year Performance Review for FY 2025 and Pre-Planning Session (P.R. No. 2025-06-286)

I. SCOPE

The Insurance Commission (IC) seeks the services of professional facilitators to design and conduct a tailored program for the Mid-Year Performance Review for FY 2025 and Pre-Planning Session.

The prospective service provider shall submit a quotation inclusive of all requirements for the **Conduct and Facilitation of the Mid-Year Performance Review for FY 2025 and Pre-Planning Session on June 30, 2025 to July 02, 2025** (inclusive of travel time) at a venue to be determined later.

II. SPECIFIC DELIVERABLES AND REQUIREMENTS

The facilitators shall provide the following:

1. Pre-Workshop Activities

1.1. Coordination and Needs Scoping

- Conduct initial meetings with IC's Planning and Management Division and key officials to clarify session objectives, organizational context, and strategic direction.
- Review existing strategic documents, performance reports, and other relevant materials to inform program design.

1.2. Data Gathering and Analysis

- Administer diagnostic tools (e.g., surveys, focus group discussions, among others) to gather input on functional group performance, cross-functional activities, and capacity development needs.
- Analyze responses to identify key themes, issues and priorities to be addressed during the workshop.

2. Program Design and Facilitation

Facilitators shall develop and deliver a tailored program incorporating the following key components:

2.1. Performance Assessment of Functional Groups

- Design and lead sessions to assess FY 2024 performance and accomplishments of each Functional Group and Division, benchmarked against established performance targets.
- Facilitate performance review for the first half of FY 2025 and discuss progress needed to meet targets for the remaining months.

2.2. Evaluation of Cross-Functional and Strategic Initiatives

- Conduct sessions to evaluate key cross-cutting initiatives, including progress in digital transformation efforts, policy implementation, and agency-wide programs.
- Highlight interdependencies, synergies, and barriers across Functional Groups.

2.3. Gaps Identification and Strategy Formulation

- Facilitate SWOT or cross-SWOT analyses to surface internal and external issues.
- Facilitate group work to formulate strategies that address policy gaps, operational bottlenecks, and areas for reform.

2.4. Strategy Alignment and Forward Planning

- Facilitate the preparation of catch-up plans or recalibrated targets for FY 2025, if necessary.
- Lead the refinement and finalization of realigned targets and commitments for each FG, laying the foundation for the next strategic cycle.

3. Synthesis and Integration

- Conduct synthesis at the end of each activity and at the conclusion of the workshop to consolidate shared insights and collective strategies.
- Gather and process participant inputs to surface collective direction and build a cohesive understanding of how IC can achieve its institutional objectives.

4. Reporting and Post-Workshop Activities

- Submit a Comprehensive Evaluation and Synthesis Report within fifteen (15) working days from the closing of the workshop, documenting highlights, recommendations, and agreed actions.
- Participate in post-workshop meetings to debrief with IC officials, validate findings, and discuss follow-through activities.

5. Program Outline and Evaluation

- A **detailed Program Outline** must be submitted as part of the technical proposal, aligned with IC's strategic objectives and the identified needs of participants.

- Proposals will be evaluated based on **Annex A: Table of Rating Factors**, assessing quality, relevance, and responsiveness to IC's performance and planning needs.

III. TECHNICAL AND LOGISTICAL REQUIREMENTS

1. Number of Participants

The guaranteed number of participants is **80 pax**, composed of the Executive Committee members, Directors, Division Managers, Supervisors and representatives of IC Employees Welfare Association and Gender and Development.

2. Facilitation Team Composition

There shall be at least one (1) Lead Facilitator and one (1) Co-Facilitator responsible for the delivery and conduct of sessions and workshops.

3. Conduct of Pre-Work Activities

Facilitators shall carry out Pre-Work activities to determine appropriate learning and development methods and tools tailored to the needs of the participants and the strategic objectives of the program.

4. Program Logistics

The quotation shall cover all necessary logistical requirements, including:

- Design, printing, and preparation of workshop materials
- Coordination, communication, and documentation costs
- Transportation, per diem, and accommodation (if applicable)

Facilitators shall provide all required supplies and materials necessary for the effective delivery of activities and workshops.

IV. MODE OF PROCUREMENT

The mode of procurement shall be Negotiated Procurement under Small Value Procurement as provided under Section 53.10 of the 2016 Revised Implementing Rules and Regulations (RIRR) of Republic Act No. 9184. It is understood that the relevant provisions of the said law and its implementing rules shall apply, govern and complement the agreement arrived at under this TOR.

Service providers must be registered in the Philippine Electronic Government Procurement System (PhilGEPS).

V. GENERAL CONDITIONS

1. 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 A – Reply Slip*).
2. The sealed quotation shall be submitted to IC, together with the following documentary requirements:
 - a. Certified true copy of the company's PhilGEPS Registration
 - b. Certified true copy of the 2023 Mayor's/Business Permit
 - c. Certified true copy of the Latest Income/Business Tax
 - d. Notarized Omnibus Sworn Statement (*Annex B – Omnibus Sworn Statement*)
 - e. Outline of the proposed Program from Pre-, Peri- and Post-Activity
3. Only those with complete documents received within the deadline shall be evaluated and considered for the project. Quotations over the Approved Budget Cost shall likewise be disqualified.
4. The sealed quotation shall be submitted personally or through email to the Planning and Management Division of the Insurance Commission at 1071 United Nations Avenue, Ermita, Manila not later than **June~~27~~, 2025, 12:00 PM**.

VI. EVALUATION AND SELECTION CRITERIA

Bid proposals shall be evaluated in accordance with the **Annex A: Table of Rating Factors** to ensure compliance with the technical requirements of the Commission.

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.

VII. 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
4. Notarized Omnibus Sworn Statement
5. Tax Clearance

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.

VIII. PAYMENT TERMS

The payment for the services rendered shall be made within thirty (30) days after the complete delivery of services and the issuance of billing statement by the supplier.

Advance payment may be allowed subject to the provision of Section 4.3, Annex D of R.A. 9184.

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.



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ANNEX A: TABLE OF RATING FACTORS

Conduct and Facilitation of the Mid-Year Performance Review for FY 2025 and Pre-Planning Session

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

REPLY SLIP

Name of Supplier : _____
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 **Conduct and Facilitation of the Mid-Year Performance Review for FY 2025 and Pre-Planning Session**, subject to the terms and conditions stated in the Terms of Reference (TOR):

Item and Description	Quantity and Unit	Total Cost
Conduct and Facilitation of the Mid-Year Performance Review for FY 2025 and Pre-Planning Session (P.R. No. 2025-06-286) Note: <ul style="list-style-type: none">• Total Cost should not exceed ABC of Five Hundred Seventy Thousand Pesos (Php 570,000.00).• Total Cost is inclusive of 12% VAT and all other applicable taxes and charges.	1 Lot	

In compliance with the TOR, certified true copies of the following required valid documents are enclosed:

1. Mayor's Business Permit
2. Latest Income / Business Tax Return
3. Proof of PhilGEPS Registration Number
4. Notarized Omnibus Sworn Statement
5. Tax Clearance
6. Outline of the proposed Program from Pre-, Peri- and Post-Activity

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]