



March 2, 2022

REQUEST FOR QUOTATION
No.: 2022-FAG(025)-NPSVP-0013

Consultancy Services for Strategic Planning Activity
(Negotiated Procurement – Small Value Procurement)

Sir/Madam:

The Credit Information Corporation through **Finance and Administration Group** invites you to submit your quotation / offer for the project below using the **Price Proposal Form (see Annex "A")** subject to the terms and conditions stated in the RFQ and Terms of Reference (**see Annex "B"**).

QTY	UOM	Description	Approved Budget for the Contract (ABC) in PHP
1	lot	Consultancy Services for Strategic Planning Activity	200,000.00

Contract Duration: Forty-Five (45) days

Submit your proposal, together with the following documents, duly signed by you or your duly authorized representative, not later than **March 8, 2022, 5:00 p.m.**

- PhilGEPS Platinum Certificate/Number;**
- Mayor's/Business Permit for the current year;**
- Curriculum Vitae and Training Certificates;**
- Notarized Omnibus Sworn Statement (Annex C); and**
- For Authorized Representatives: **SPA (Sole Proprietorship/Partnership), Secretary's Certificate or Board Resolution (Corporation).**

Only one (1) set of documents certified to be true copies of the original shall be required.

Proposals and other documents required shall be sent electronically to procurementunit@creditinfo.gov.ph. Electronically submitted proposals and documents must be submitted on or before the deadline of submission as stated in this RFQ.

Upon determination of your technical, legal and financial eligibility, the Administration Unit of the CIC shall undertake negotiation with your company based on the Technical Specifications for this project.

SIGNED
PHOEBE ANN R. WAGAN
Administrative Services Officer V

PRICE PROPOSAL FORM

Date: _____

Administrative Office
Credit Information Corporation
6F, Exchange Corner Bldg., 107 VA Rufino St.
cor. Esteban St., Legaspi Village, Makati City

Sir/Madam:

Having examined the Request for Quotation No. RFQ No. 2022-FAG(025)-NPSVP-0013, which includes the terms of reference, the receipt of which is hereby duly acknowledged, the undersigned, offer to, in conformity with the said Request for Quotation for the sums stated hereunder:

QTY	UOM	PARTICULARS	TOTAL BID PRICE in PhP
1	lot	Consultancy Services for Strategic Planning Activity	

CONTRACT PERIOD: Forty-Five (45) days upon receipt of Notice to Proceed

TOTAL BID PRICE IN WORDS:

We undertake, if our Proposal is accepted, to deliver the goods/services as identified in the Technical Specifications/Terms of Reference and in accordance with the delivery schedule.

Our quotation includes all taxes, duties and/or levies payable and is valid for a period of THIRTY (30) calendar days upon issuance of this document.

We understand that the CIC Technical Working Group may require from us the submission of documents that will prove our legal, financial and technical capability to undertake this project.

Until a formal Contract is prepared and executed, this Proposal, together with your written acceptance thereof and the Notice of Award, shall be binding upon us.

We understand that you are not bound to accept the lowest or any Proposal you may receive.

Dated this _____.

Signature of Authorized Representative

Printed Name of Authorized Representative

Capacity

Duly authorized to sign Proposal for and on behalf of: _____

**COMPLIANCE FORM
Terms of Reference
Consultancy Services for Strategic Planning Activity**

A. RATIONALE

In normal times or before the COVID-19 pandemic, organizations have been experiencing tremendous changes brought by the exponential development in information and communication technologies (ICT) and the continuous demand of customers for quality and value-for-money in products and services. During those times, organizations and its leaders deal with the challenges using the established management structures and process. However, various concepts and tools for improvement and productivity adopted by organizations all over the world provided mixed results.

The COVID-19 pandemic resulted in an unprecedented and uniquely severe global crisis in the modern history. Organizations and its leaders are left scrambling to innovate and/or development management models, approaches and structures that can respond swiftly and quickly to the new and rapidly shifting environment as well as ensure the agility, continuity and sustainability of their business and operations. During this COVID-19 pandemic, organizations have to reexamine and reassess their competencies, collective thought processes as well as challenge their own assumptions relating to the market and/or business environment they are operating.

In the research conducted by Andre de Waal, a leading business theorist and known for his contributions on performance management and high-performance organizations, consensus is the organizational characteristics that lead to high performance. He defined a High-Performance Organization (HPO) as an organization that achieves financial results that are better than those of its peer group over a longer period of time, by being able to adapt well to changes and react to these quickly, by managing for the long term, by setting up an integrated and aligned management structure, by continuously improving its core capabilities, and by truly treating the employees as its main asset.

In the same research, Mr. Waal concluded that one of the characteristics of a HPO is that cross-functional and cross-organizational collaboration is stimulated by making teamwork and collaboration top priorities of management. Teamwork is fostered by stressing the importance of teams for the performance of the organization, and developing a team feeling by creating team commitment, getting everyone on the same team, and establishing shared responsibility. HPOs engage and involve people in developing vision and values, interactive discussion and decision-making processes as well as communicate issues and development important to the organization. By establishing a shared understanding, a culture of transparency, openness and trust is created by openly sharing information a feeling of corporateness, and adopting and fostering an "all for one, one for all" mentality, a shared identity and sense of community is created.

One of the most important business process management approaches in fostering high-performing and committed teams is Strategic Planning. Strategic planning is ongoing organizational process using available knowledge and expertise to formulate the business intended direction. This process backed by data and sound reasoning will enable the prioritization of efforts, allocation and scarce resources, alignment of

stakeholders and personnel on the organization's goals. As a strategic event, it creates a single, forward-focused vision that align the organization to the customer and/or market requirements as well as to that of its stakeholders.

B. OBJECTIVES

The objectives of the Strategic Planning Activity of CIC are as follows:

- a. Understand the organizations' competencies and attributes as well as the current market and industry state, challenges and opportunities;
- b. Review and/or reformulate the Mission, Vision, Goals and Objectives of the organization;
- c. Review, realign and/or redefine the industry and market opportunities, performance outcomes and targets, as well as medium-term programs and projects of the organization;
- d. Identify and prioritize the annual plans, activities and projects (PAPs) of the organization for the current year and succeeding period; and,
- e. Establish shared responsibility and create commitment between and among Board and Management on the corporate performance.

C. OUTCOMES

The expected outcomes of the Strategic Planning activity are as follows:

- a. Summary of the organization competencies and attributes, performance against the market and competition, and key factors driving the current business model;
- b. Summary of the strategic outlook as well as the key strategic challenges and opportunities to be addressed for continuity and sustainability in the market and industry;
- c. Clear and forward-focused vision of the future incorporating the mandated and desired impact of the organization to the public, market and industry;
- d. Organizational outcomes, performance targets and core strategies that will be adopted to achieve the mandate, mission and vision; and,
- e. Clear and time-bounded programs and projects to implement the core strategic as well as attain the organizational outcomes and performance targets.

D. ACTIVITIES

The formulation of an organizational and/or business strategies is a multi-faceted and complex action. Thus, a plan or flow actions during Strategic Planning activity is created. The Strategic Planning activity will be conducted in three (3) phases – Pre-Activity phase, Strategic Planning conference, and Post-Activity phase.

The Pre-Activity phase will focus on the identification of the appropriate participants, information sources, arrangements and schedule, and team that will facilitate the activity. At this phase, the actions during the phase will include the engagement of a Consultant, establishment of the strategy formulation process, identification of the participants, timeline and/or how long the strategy process will run, roles and responsibilities of the facilitators, and the likes. The activities in this phase will be designed to be semi-structured and lightweight in approach to encourage the open, fluid, divergent, creative and fostering exchanges needed to drive deep discussions,

sharing of views as well as development of innovative, agile and/or development strategies.

The Strategic Planning conference will be facilitated through online videoconferencing platform with the participants participating online while each operating units will have the option to meet physically during break-away sessions. The activities during the conference will include the review of the Mission, Vision, Goals and Objectives as well the formulation of the medium-term strategic programs and projects.

The Post-Activity phase will be focusing on having the realigned and/or reformulated Mission, Vision, Goals and Objectives as well as the formulated medium-term strategic programs and projects approved by the Board of Directors. Upon approval, accountable and responsible units will be tasked to put the details of the medium-term strategic programs and projects while the strategic plan will be written and/or placed into a document.

Most of the activities in the various phase of the Strategic Planning activity will be handled by the Strategic Planning Consultant (Consultant) in coordination with the Senior Vice President as well as key officers.

E. TIMELINE

Activity	Office/Person Responsible	Timeline
1. Strategic Direction Survey	SVP-FAG	3 weeks
2. Procurement of Strategic Planning Consultancy	<ul style="list-style-type: none"> • FAG • BAC 	3 weeks
3. Pre-Planning Activities	Consultant	1 week
4. Strategic Planning Conference	<ul style="list-style-type: none"> • Consultant • FAG 	5 days
5. Approval of Strategic Planning Conference Outcomes/Output: * Reformulated Mission, Vision, Goals and Objectives * Proposed Strategic Programs and Projects	<ul style="list-style-type: none"> • Consultant • President & CEO 	2 days
6. Post-Planning Activities	<ul style="list-style-type: none"> • Consultant • Accountable/Responsible Officers 	2 weeks
7. Drafting of Strategic Plan	<ul style="list-style-type: none"> • Consultant • SVPs 	2 weeks
8. Annual Plan, Activities and Projects	<ul style="list-style-type: none"> • Accountable/Responsible Officers • Budget Unit 	2 weeks

F. PROCUREMENT REQUIREMENTS

A Strategic Planning Consultant will be engaged to facilitate the Strategic Planning Activities of CIC.

a. Minimum Qualifications

The following are the minimum qualifications for the Consultant for the Strategic Planning Activities of CIC:

Requirements	Statement of Compliance "Comply" or "Not Comply"	Proof/Evidence of Compliance
1. Have at least three (3) years' experience in providing strategic planning consultancy services in the Philippine financial services industry and/or similar industry		
2. Have adequate support personnel during the various phase of strategic planning activities		
3. Have at least one (1) year experience in conducting virtual strategic planning consultancy		
4. Have the use of reliable virtual conference platform		
5. Pursuant to Section 23.4.1.3 of the 2016 revised Implementing Rules and Regulations of Republic Act. No. 9184, have a Single Largest Completed Contract of at least one (1) contract similar to the Strategic Planning Activities, wherein the value of which must be equivalent to at least 25% of the ABC, adjusted to current prices using the Consumer Price Index issued by the Philippine Statistics Authority.		

b. Contract Activities

Particulars	Timeline
1. Pre-planning Conference	
1.1. Activity Coordinator	2 days
1.2. Office of the President	3 days
1.3. Office of the Senior Vice Presidents	
1.4. Board Secretariat	
1.5. Internal Audit Unit	
2. Strategic Planning Conference	
2.1. Reformulation of Mission, Vision, Goals and Objectives	2 days
2.2. Formulation of Strategic Programs and Projects	3 days
3. Post-planning Activities	
3.1. Approval of Strategic Planning Conference Outcomes	1 day
3.2. Drafting of the Strategic Plan	15 days

c. Contract Deliverables

Particulars	Timeline	Remarks
1. Pre-planning Conference		
1.1. Meeting Schedule	Within 3 days upon receipt of Notice to Proceed	PDF file and duly-signed
2. Strategic Planning Conference		
2.1. Agenda, Activities, Timeline and Conference Requirements	Within 3 days upon receipt of Notice to Proceed	PDF file and duly-signed
2.2. Reformulated Mission, Vision, Goals and Objects	During the Conference	Any format
2.3. Strategic Programs and Projects	During the Conference	Any format
3. Post-planning Activities		
3.1. Strategic Plan	Within 15 days after Boards' approval of the Mission, Vision, Goals, Objectives and Strategic Programs/Projects	Word and PDF file, wherein PDF file is duly-signed

d. Contract Period

The contract period shall be 45 days upon receipt of the Notice to Proceed.

e. Estimated Budget for the Contract

In the Approved Annual Procurement Plan for FY 2022, the CIC provided for the amount of PHP200,000 for the engagement of a consultant for the Strategic Planning activities for the year.

f. Schedule of Payment

The payment shall be upon the completion of the Contract Activities and acceptance of the Contract Deliverables, following government accounting and auditing regulations.

STATEMENT OF COMPLIANCE

Dated this _____.

Signature of Authorized Representative

Printed Name of Authorized Representative

Capacity

Duly authorized to sign Compliance for and on behalf of: _____

Omnibus Sworn Statement

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;
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 examine all of the Bidding Documents;
 - b) Acknowledge all conditions, local or otherwise, affecting the implementation of the Contract;
 - c) Made an estimate of the facilities available and needed for the contract to be bid, if any; and
 - d) Inquire or secure 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; and
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.
11. *[Name of Bidder]* hereby assigns the following contact number/s and e-mail address/es as the official telephone/fax number and contact reference of the company where the CIC BAC and CIC notices may be transmitted.
Telephone No/s.: _____

Fax No/s.: _____
E-mail Add/s.: _____

It is understood that notices/s transmitted in the above-stated telephone/fax numbers and/or e-mail address/es are deemed received as of its transmittal and the reckoning period for the reglementary periods stated in the bidding documents and the revised Implementing Rules and Regulations of Republic Act No. 9184 shall commence from receipt thereof.

IN WITNESS WHEREOF, I have hereunto set my hand this ___ day of _____, 2017 at _____, Philippines.

Bidder's Representative/Authorized Signatory

SUBSCRIBED AND SWORN to before me this ___ day of [month] [year] at [place of execution], Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her [insert type of government identification card used], with his/her photograph and signature appearing thereon, with no. _____ .

Witness my hand and seal this ___ day of [month] [year].

NAME OF NOTARY PUBLIC

Doc. No. ____
Page No. ____
Book No. ____
Series of ____.

Note:

"Sec. 12. Competent Evidence of Identity – The phrase "competent evidence of identity" refers to the identification of an individual based on:

At least one current identification document issued by an official agency bearing the photograph and signature of the individual, such as but not limited to, passport, driver's license, Professional Regulations Commission ID, National Bureau of Investigation clearance, police clearance, postal ID, voter's ID, Barangay certification, Government Service and Insurance System (GSIS) e-card, Social Security System (SSS) card, Philhealth card, senior citizen card, Overseas Workers Welfare Administration (OWWA) ID, OFW ID, seaman's book, alien certificate of registration/immigrant certificate of registration, government office ID, certification from the National Council for the Welfare of Disabled Persons (NCWDP), Department of Social Welfare and Development (DSWD) certification;

The Board Resolution or Secretary's Certificate referring to the said Board Resolution designating the bidder's authorized representative and signatory need not specifically indicate the particular project where such authority is given provided that the said authority covers activities by CIC.