



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 Insurance Commission (IC) Strategic Planning Workshop (SPW) for FY 2024
REFERENCE NO./PR NO.	PR No. 2024-05-136
APPROVED BUDGET FOR THE CONTRACT (ABC)	Php 900,000.00 inclusive of all applicable taxes and other charges <i>(Quotations/Proposals exceeding this amount shall be disqualified)</i>
MODE OF PROCUREMENT	Section 53.10 Small Value Procurement
INCLUSIONS	<ul style="list-style-type: none"> Facilitators, assistants and/or marshals
DEADLINE OF SUBMISSION OF SEALED QUOTATION/S	03 June 2024

The sealed quotation may be submitted personally or through e-mail not later than **03 June 2024, 10:00 AM**, to the Insurance Commission through the contact information provided below:

Contact Person: **Mr. Mark Franklin M. Sanchez**
 IC Planning Officer III
 mfm.sanchez@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;


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



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Manila



TERMS OF REFERENCE

Conduct and Facilitation of the IC Strategic Planning Workshop (SPW) for FY 2024 (P.R. No. 2024-05-136)

I. SCOPE

1. The prospective service provider shall submit a quotation inclusive of all requirements relative to the **Conduct and Facilitation of the IC Strategic Planning Workshop (SPW) for FY 2024 on 25 – 26 June 2024**, with the following specifications:

GENERAL REQUIREMENTS:

1. Conduct and facilitation of IC SPW for FY 2024.

<i>Description/Specifications</i>	<i>Quantity and Unit</i>
Program Facilitators including Customized Program and Synthesis for the IC SPW for FY 2024 1. Facilitators shall formulate a customized indoor program composed of the following: 1.1. Strategic Positioning: Assessment of the level of accomplishments of each FG/Division/Unit's vis-à-vis their set targets, programs, and activities for FY 2024; 1.2. SWOT Analysis: Processing of the determined SWOT through cross SWOT and/or other analysis and development of strategies to capitalize on opportunities and mitigate risks by formulating action plans; 1.3. Updating of Balanced Scorecard: Presentation of the finalized FY 2024 Targets and Commitments, IC Strategy Map and/or Priority Programs; 1.4. Finalization of Strategic Plan/Targets for 2024: Integration of the strategic initiatives and programs in the IC Strategic Plan and commitment signing.	1 lot

<i>Description/Specifications</i>	<i>Quantity and Unit</i>
<p>2. The 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.</p> <p>3. Facilitators shall submit an evaluation report to IC within fifteen (15) days after the conduct of the 2024 IC Strategic Planning Workshop. Post-workshop meeting/s shall be conducted to discuss the results of the workshop.</p> <p>4. The price quotation must include all expenses for program logistics, such as production of workshop materials, communication, transportation, per diem, health and safety mandatories.</p> <p>5. A copy of the Program Outline must also be submitted together with the requirements enumerated in Item II (2) 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).</p>	

6. Guaranteed number of participants is **100 pax**. Participants to the SPW shall be comprised of Executive Committee, Directors, Division Mangers, and Supervisors or next-in-rank.
7. There shall be at least one (1) lead facilitator and one (1) co-facilitator/assistant to deliver and conduct the sessions/workshops.
8. Facilitators shall conduct a pre-work activities to determine the appropriate learning and development methods and tools to be used in the facilitation of the program.
9. Facilitators shall facilitate processing/synthesis at the end of each activity. They shall collect relevant responses from participants during the activities to formulate the collective idea on achieving targets/objectives.
10. Facilitators shall provide all supplies/materials needed for all activities.

SCHEDULE OF REQUIREMENTS

Schedule	Particulars	Number/ participants
June 2024	Pre-workshop stakeholder meetings	Planning Representatives
25 – 26 June 2024	Strategic Planning Workshop	100 pax (Executive Committee, Division Managers, Supervisors/next-in-rank)
July 2024	Post-workshop synthesis	Planning and Management Division and planning representatives

II. 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).

III. GENERAL CONDITIONS

1. All entries in the quotation (Reply Slip) must be typewritten on the company's letterhead, duly signed by the supplier/dealer or its duly authorized representative.
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, including (Pre-, During 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 IC Planning and Management Division, Second Floor, IC Building, 1071 United Nations Avenue, Ermita, Manila not later than **03 June 2024 at 10:00 AM**.

IV. 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.

V. AWARDING OF CONTRACT

For verification and validation purposes, the bidder with the Lowest Calculated Responsive Bid (LCRB) 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

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. PAYMENT TERMS

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


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

ANNEX A: TABLE OF RATING FACTORS

Program Facilitators including Customized Programs and Synthesis for the IC Strategic Planning Workshop (SPW) for FY 2024

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 **Hiring of Facilitators for the Conduct of the 2024 IC Strategic Planning Workshop (SPW)**, subject to the terms and conditions stated in the Terms of Reference (TOR):

Item and Description	Quantity and Unit	Total Cost
Hiring of Facilitators for the Hiring of Facilitators for the Conduct of the 2024 IC Strategic Planning Workshop (SPW) (P.R. No. 2024-05-136) Note: <ul style="list-style-type: none">Total Cost should not exceed ABC of Nine Hundred Thousand Pesos (Php 900,000.00)Total Cost is inclusive of 12% VAT and all other applicable taxes and charges	1 Lot	Php 900,000.00

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. Outline of the proposed Program, including (Pre-, During 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]