

## TERMS OF REFERENCE

<b>NAME OF PROJECT</b>	Engagement of a consultant to facilitate the National Home Mortgage Finance Corporation's Planning Session for CY 2021
<b>DURATION</b>	24 hours (3 days)
<b>TARGET DATES</b>	March 5-7, 2020
<b>TARGET PARTICIPANTS</b>	Group Heads, Department Managers, and Key Personnel
<b>VENUE OF TRAINING</b>	To be determined

### I. OBJECTIVES

The project aims to hire a consultant to facilitate the conduct of NHMFC's Planning Session for CY 2021.

### II. SCOPE OF WORK

The consultant/facilitator shall work hand-in-hand with NHMFC's Corporate Planning Division and will do the following:

- Design a programme for the duration of the planning session;
- Facilitate discussions on the review the Strategic Objectives of NHMFC;
- Facilitate discussion in identifying the gaps and issues within its operations affecting the realization of the Corporation's objectives;
- Facilitate workshops to create corrective actions which will address the issues and gaps;
- Facilitate discussion in evaluating and rationalizing of Strategic Initiatives / Projects created and committed to the NHMFC's programs/projects and strategies to achieve the Corporation's objectives for CY2021 and onwards

- Facilitate workshops to create comprehensive strategic plans which will detail the Corporation's approved budget, personnel movement, and procurement to achieve NHMFC's objectives for CY2021 onwards;
- Guide the participants in crafting and designing their own project management plans;
- Facilitate workshops to create strategic plans hinged on NHMFC's programs/projects, initiatives and strategies which shall be used as basis for the Budget Proposal for FY2021;
- Facilitate workshops to formulate the Groups' balanced scorecard which shall include strategic measures and annual targets;
- Facilitate a session to consolidate and finalize the outputs of the sessions; and
- Submit a final report which shall provide the highlights of the workshop.

### **III. QUALIFICATIONS OF THE CONSULTANT/FACILITATOR**

1. The consultant has conducted/facilitated strategic planning sessions for no less than five (5) years.
2. The consultant has conducted/facilitated strategic planning sessions for no less than five (5) institutions.
3. The consultant or its lead facilitator/s must have experience and/or knowledge in Quality Management System and must be well-versed in the requirements of ISO 9001:2015.
4. The consultant preferably has a team composed of at least one (1) lead facilitator and/or an assistant.
5. The consultant's lead facilitator/s must be Certified Project Management Professional;
6. The consultant's lead facilitator/s must have trained or possess the following certifications:
  - Certified Six Sigma Black Belt (CSSBB) or higher;
  - Manager of Quality and Organizational Excellence (CMQ-OE);
 and
  - Quality Management (ISO 9001)

#### **IV. APPROVED BUDGET FOR THE CONTRACT**

The approved budget for the contract is Php 300,000.00 including government taxes and charges to be taken from NHMFC's Corporate Operating Budget for CY2020.

#### **V. MODE OF PROCUREMENT**

The mode shall be Small Value Procurement as provided under Section 53.9 of the Revised Implementing Rules and Regulations (RIRR) of Republic Act No. 9184.

#### **VI. EVALUATION AND SELECTION CRITERIA**

Bid proposals shall be evaluated in accordance with the Revised Implementing Rules and Regulations (RIRR) of Republic Act No. 9184.

A bid is determined to be responsive if it is equal to or higher than the passing rate of 80%.

#### **VII. DOCUMENTS FOR SUBMISSION AND OTHER REQUIREMENTS**

Interested bidders must submit and present copies of the following documents:

1. Omnibus Sworn Statement
2. Curriculum Vitae of the Lead/Assigned Facilitator
3. DTI Registration and Mayor's Permit / Business Permit
4. PhilGEPS Registration Number
5. Latest Income / Business Income Tax Return
6. Project Proposal with the name of the Lead Facilitator / Quotation
7. Draft Contract

*The bidder must certify that the lead facilitator/s and its team have not visited or travelled to or from any affected country/ies with confirmed and reported cases of novel coronavirus pneumonia two (2) weeks before the event.*

PREPARED BY:

  
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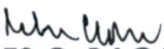
APPROVED BY:  
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