



TERMS OF REFERENCE

ENGAGEMENT FOR CONSULTING SERVICES FOR NATIONAL HOME MORTGAGE FINANCE CORPORATION PLANNING SESSION FOR CY 2022 - 2023

I. OBJECTIVE

The project aims to hire a consulting firm to facilitate the conduct of NHMFC's Planning Session for CY 2022-2023.

II. SCOPE OF WORK

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

1. Conduct a preparatory session and design a programme for the duration of the planning session.
2. Facilitate discussions on the following:
 - a. Review and updating of NHMFC's Five-Year Plan 2022-2026
 - b. Identification of gaps and issues within its operations affecting the realization of the Corporation's objectives.
 - c. Evaluation and rationalization of strategic initiatives or projects that will form part of the Corporation's overall strategies for CY2022 and onwards, focusing on the following areas:
 - Compensation and Position Classification System (CPCS)
 - Customer Satisfaction
 - Securitization
 - Marketing Initiatives
 - Innovation in Programs and Services
 - Executive Order 138
 - Knowledge Management and Successors' Plan
3. Facilitate workshops to create corrective actions which will address the issues and gaps.
4. Facilitate workshops to create comprehensive strategic plans which will detail the Corporation's approved budget, personnel movement, and procurement to achieve NHMFC's objective for CY2022 and onwards.
5. Guide the participants in crafting and designing their own project management plans.
6. Facilitate workshops to create strategic plans hinged on NHMFC's programs/projects,

initiatives and strategies.

7. Facilitate workshops to facilitate the Group's balanced scorecard which shall include strategic measures and annual targets.
8. Facilitate a session to consolidate and finalize the outputs of the session
9. Submit a report of the corporate planning session including but not limited to highlights of the activities and consolidated outputs of the groups.

Participants - Group Heads, Department Managers, Division Chiefs and Key Personnel

Duration - 2 day (Preparatory Session) and 2 days (Planning Session Proper)

Target Dates - November 18-19, 2021

Venue of Training - Via Online/Virtual Meeting

III. QUALIFICATIONS OF THE CONSULTANT/FACILITATOR

1. The Consulting firm/Facilitators has conducted/facilitated strategic planning sessions for no less than five (5) years.
2. The Consulting firm/Facilitators has conducted/facilitated strategic planning sessions for no less than five (5) institutions.
3. The Consulting firm or its lead facilitator has conducted /facilitated at least three (3) online / virtual planning sessions/trainings/seminars.
4. The Consulting firms lead facilitator must be a Certified Project Management Professional
5. The Consulting firm's lead facilitator must have trained or possess at least one of 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 150,000.00 including government taxes and charges to be taken from NHMFC's Corporate Operating Budget for CY2021.

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. DOCUMENTARY REQUIREMENTS

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

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

PREPARED BY:



KRISTINE KATE C. JIMENEZ

Division Chief III

Corporate Planning Division

APPROVED BY:

BIDS AND AWARDS COMMITTEE



Digitally signed by

ATTY. DANTE M. PATAPAT

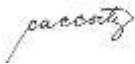
Member



Digitally signed
by Favila Maria
Luisa Merto

MARIA LUISA M. FAVILA

Member



Digitally signed by Cortez
Carolina Cervania

CAROLINA C. CORTEZ

Member



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Roldan Romeo Salud

ROMEO S. ROLDAN

Vice-Chairman

MA. VICTORIA L. ALPAJARO

Chairman
(not present)