



TERMS OF REFERENCE

NAME OF PROJECT	Engagement of a consultant to facilitate the National Home Mortgage Finance Corporation's Planning Session for CY 2021-2022
DURATION	12 hours (2 days)
TARGET DATES	16-17 February 2021
TARGET PARTICIPANTS	Group Heads, Department Managers, and Key Personnel
VENUE OF TRAINING	Via Online/Virtual Meeting

I. OBJECTIVES

The project aims to hire a consultant to facilitate the conduct of NHMFC's Planning Session for CY 2021-2022.

II. SCOPE OF WORK

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

1. 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 2018-2022;
 - 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 CY 2021 and onwards.
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 objectives for CY2021 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 formulate the Groups' balanced scorecard which shall include strategic measures and annual targets;
8. Facilitate a session to consolidate and finalize the outputs of the sessions; and
9. Submit a report which shall provide the highlights of the workshop.

III. QUALIFICATIONS OF THE CONSULTANT/FACILITATOR

1. The consultant/facilitator has conducted /facilitated strategic planning sessions preferably for more than five (5) years;
2. The consultant/facilitator has conducted /facilitated strategic planning sessions preferably for more than five (5) institutions;
3. The consultant or its lead facilitator has conducted /facilitated preferably more than three (3) online / virtual planning sessions/trainings/seminars.
4. The consultant's lead facilitator must be a Certified Project Management Professional;
5. The consultant's lead facilitator must have trained or possess the following certifications:
 - a. Certified Six Sigma Black Belt (CSSBB) or higher;
 - b. Manager of Quality and Organizational Excellence (CMQ-OE); and
 - c. 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. 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 / Quotation with the name of the Lead Facilitator

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APPROVED BY:

BIDS AND AWARDS COMMITTEE

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