




REQUEST FOR PROPOSAL

1. The Philippine Institute for Development Studies (PIDS) invites all eligible individual consultants to submit proposals for the **Consulting Services for the Facilitation and Conduct of the Strategic Planning Workshops and Preparation of a Five- Year Strategic Plan (2026-2030) Aligned with the Principles of ISO 9001:2015 Quality Management Systems for the Philippine Institute for Development Studies.**
2. The Approved Budget for the Contract (ABC) is **PhP400,000.00.**
3. Interested consultants must submit the following documents using PIDS the prescribed forms:
 - a) Curriculum Vitae of the proposed Consultant(s)¹
 - b) Technical Proposal Form¹
 - c) Financial Proposal Form¹
 - d) Filled out Data Privacy Notice and Personal Data Protection Form¹
 - e) Statement of Completed contracts²
 - f) Statement of All Ongoing and Awarded But Not Yet Started Contracts²
 - g) Notarized Omnibus Sworn Statement (for ABC above PhP50,000.00)¹
 - h) Income/Business Tax Returns (for ABC above PhP500,000.00)¹
 - i) PhilGEPS Registration Number (certificate or screenshot)¹
 - j) Valid Mayor's/Business Permit (Firm) or BIR Certificate of Registration³ (Individual).
4. Interested consultants may obtain further information from the Procurement Management Division at telephone via email at procurement@pids.gov.ph.
5. The Institute shall adopt the Quality-Based Evaluation procedure in selecting consultants based on the attached Terms of Reference.
6. The deadline for submission of proposals is on **25 November 2024 (10:00 AM)** addressed to:

The BAC Chairperson for Consultancy
Services c/o The BAC Secretariat
Procurement Management Division
18/F Three Cyberpod Centris – North Tower, EDSA cor. Quezon Ave., Quezon City

Proposals may also be submitted through email at procurement@pids.gov.ph .

7. PIDS reserves the right to reject any or all of the proposals, declare a failure of bidding, or not award the contract if there is evidence of collusion, including any act that restricts, suppresses, or nullifies competition, or if there is a failure to follow the prescribed bidding procedures. PIDS also reserves the right to waive any required formality in the proposals received and select the proposal it determines most advantageous to PIDS.


DR. AUBREY D. TABUGA
Chairperson
PIDS-BAC for Consultancy Services

Reference No.:2024-389

¹Applicable for individual consultants and firms

²Applicable for firms only

³ Individual consultants must issue Official Receipt (OR) during payment.

Philippine Institute for Development Studies

TERMS OF REFERENCE

CONSULTING SERVICES FOR THE FACILITATION AND CONDUCT OF THE STRATEGIC PLANNING WORKSHOPS AND PREPARATION OF A FIVE- YEAR STRATEGIC PLAN (2026-2030) ALIGNED WITH THE PRINCIPLES OF ISO 9001:2015 QUALITY MANAGEMENT SYSTEMS FOR THE PHILIPPINE INSTITUTE FOR DEVELOPMENT STUDIES

I. BACKGROUND

The Philippine Institute for Development Studies (PIDS) is committed to perform policy-oriented research on all aspects of the Philippine economy and assist the government in formulating plans and policies that are evidence based and fully responsive to the requirements of national planning and policymaking for national development. To achieve this, PIDS established its strategic plan in December 2018 and conducted a Midterm Review of the PIDS Strategic Plan 2019-2025 in June 2022.

With the upcoming five-year period from 2026 to 2030, PIDS recognizes the need to review and formulate a strategic plan that is relevant and effective in achieving organizational success and continual improvement, enhancing its operational efficiency, research impact, and stakeholder engagement.

To achieve this, PIDS seeks consulting services for the facilitation and conduct of strategic planning workshops. These workshops are intended to provide a platform within the Institute to collaboratively identify the vision and mission that will shape its direction over the next five years. Additionally, the consultant will document the outputs of the workshop and prepare a comprehensive five-year PIDS Strategic Plan (2026-2030), ensuring that it integrates ISO 9001:2015 principles to meet quality management standards.

II. OBJECTIVES

The objectives of this consulting service are as follows:

1. To conduct review of PIDS' processes and other activities to ensure compliance with ISO 9001:2015 requirements;
2. To provide professional, technical, and consultancy services in order to meet QMS requirements;
3. To enhance the PIDS' planning process by capacitating officials and employees through trainings, coaching, and other activities;
4. To provide clear and comprehensive QMS strategic planning sessions and workshops; and
5. To ensure a harmonized approach to the agreed upon outputs and deliverables as indicated in this Terms of Reference (TOR).

The ultimate objective of this engagement is to prepare the PIDS Strategic Plan 2026 -2030.

III. SCOPE OF WORK

The Consultant is expected to perform the following tasks:

1. Manage the conduct of the workshop for the PIDS Strategic Plan 2026-2030 which includes evaluation and synthesis of the pre-planning work outputs to be used as input during the strategic planning proper, and providing sub-workshops using the structured learning experiences or exercises that depict concepts to obtain inputs from the participants;
2. Provide brief lectures using practical and applicable concepts;
3. Objectively assist in analyzing issues, reviewing performance and setting of objectives;
4. Process the outputs of the workshops to be able to package and complete review of the PIDS Strategic Plan for CY 2026-2030;
5. Ensure collaborative and meaningful discussion throughout the duration of the activity;
6. Drafting of the five-year Strategic Plan and Strategy Map for the review, comments, and approval by the PIDS Management; and
7. Finalization of the reviewed five-year Strategic Plan, subject to its acceptance and approval.

He/She may engage the services of a documenter to assist him/her in documenting the highlights of the activities (with photos if necessary).

IV. QUALIFICATIONS OF THE CONSULTANT

The Consultant shall have the following qualifications:

- At least three (3) years of relevant experience in conducting ISO 9001:2015-based Strategic Planning Workshops, OR has facilitated at least three ISO 9001-based strategic and operational planning workshops of government agencies, one of which should have at least a research function or services;
- Ability to interact and communicate effectively with the participants; Excellent Oral and Written Communication Skills
- Familiar with the PIDS' organizational issues and ISO 9001:2015 business process or similar research institutions
- Desirable Qualifications: experience in providing technical advice in the attainment of ISO certification in other government agencies.

V. DELIVERABLES

The Consultant is expected to provide the following outputs and deliverables listed below:

Activities and Deliverables	Due Dates	Amount
<p>Assessment of the PIDS 2019 - 2025 Strategic Plan and preparation of a general workplan for the 2026-2030 Strategic Planning workshops and related pre and post activities</p> <p><i>Expected Outputs/Deliverables:</i></p> <ol style="list-style-type: none"> 1. Familiarization on the PIDS 2019-2025 Strategic Plan. 2. Inception report containing the general direction and proposed work plan for the 2026-2030 Strategic Plan taking into account the incorporation of the principles of ISO 9001:2015 Quality Management System 	<p>First week of December 2024</p>	<p>20% of the contract price</p>
<p>Identify Strategic Objectives, Strategic/Performance Measures, Targets, and other necessary factors for the 5-year strategic plan</p> <ul style="list-style-type: none"> • Facilitate the conduct of the Strategic Planning Workshops to craft the Five- Year Strategic Plan of the PIDS • Review and synthesize the strategic planning workshop discussions and outputs to ensure strategic directions and commitments (Vision, Mission, Core Values, Quality Policy) and agreed strategic objectives and initiatives are accurately inputted into the five-year strategic plan • Prepare the PIDS Strategy Map • Prepare the updated Organizational SWOT and Risks • Submission of the draft Five-year PIDS Strategic Plan for the review and comments of the PIDS Management <p><i>Expected Outputs/Deliverables:</i></p> <ol style="list-style-type: none"> 1. Updated Strategic Commitments - Mission, Vision, Core Values, Quality Policy 2. Strategic Objectives, Plans and Initiatives 3. Strategy Map 4. Organizational Issues, Stakeholders and Risks 	<p>January 2025</p>	<p>50% of the contract price</p>
<p>Finalize the reviewed five-year PIDS Strategic Plan for the approval of the PIDS Management</p>	<p>End of January 2025</p>	<p>30% of the contract price</p>

VI. PROJECT DURATION AND SITE


The project is proposed to be completed within **two calendar (2) months** on a part-time basis. The Consultant's work will commence on December 2024 and must be completed by end of January 2025, or upon submission of the required outputs as specified in Item V hereof.

The main project site shall be at the PIDS Office, Quezon City while the specific venues for workshops shall be as determined by the PIDS Management.

VII. PROJECT COST

The Consultancy Service will be paid in the amount of **FOUR HUNDRED THOUSAND PESOS ONLY** (PhP400,000.00) inclusive of professional fee and all applicable government taxes.

Printing, food, accommodation, and materials during work meetings and workshops within and/or outside Metro Manila as authorized by the PIDS Management under the Scope of Work of this Terms of Reference shall be chargeable against appropriate PIDS funds.

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