



REPUBLIC OF THE PHILIPPINES
Department of Budget and Management
Malacañang, Manila

REQUEST FOR PROPOSAL

The Department of Budget and Management (DBM), through its Corporate Planning and Reforms Service (CPRS) will engage an Organizational Development and Strategic Planning Consultant for its Strategic Planning requirements in accordance with Section 53.9 of the Implementing Rules and Regulations of Republic Act No. 9184.

- Name of Project : Engagement of an Organizational Development and Strategic Planning Consultant
- Location : CPRS, Mabini Hall, Malacañang, Manila
- Brief Description : Review and redesign of the DBM planning framework and process; design and facilitation of the Strategic Planning Workshop; strengthening the mechanisms for monitoring and evaluating results, and; development of a Strategic Plan communications strategy
- Approved Budget for : Four Hundred Ninety Five Thousand Pesos
the Contract (P495,000.00)
- Contract Duration : February 18 to March 29, 2013

Prospective consultants shall accomplish, provide correct and accurate information and submit the following:

1. Duly signed Price Quotation Form (Annex "A").
2. Provide updated curriculum vitae which should include pertinent information that will be used to evaluate the highest rated credentials:
 - a. Track record – 30%
 - i. Minimum number of years of experience in the field = 10 years
 - b. Similar projects handled (completed and ongoing in the areas of strategic planning, organization and human resource development, performance management and capacity-building) – 40%
 - i. Minimum quantity of portfolio = 5 projects
 - c. Experience working with government agencies – 15%
 - d. Academic and Other Credentials – 15%
 - i. At least a master's degree holder
 - ii. Seminars attended, certifications, awards/recognitions related to performance management and capacity-building

Complete requirements should be submitted not later than 4:00 p.m. on February 4, 2013. Open quotations may be submitted, manually at the CPRS, Room 125, Mabini Hall, Malacanang, Manila, Fax No. 735-4916 or through email cprs@dbm.gov.ph.

Attached as Annex "B" is the Terms of Reference for the abovementioned project.

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Price quotation/s / offer must be valid for a period of thirty (30) calendar days from the date of submission.

Award of contract shall be made to the bidder with the highest rated credentials which complies with the minimum qualifications and other terms and conditions stated in the terms of reference. S/he must also register or be registered in the Philippine Government Electronic Procurement System.

The DBM reserves the right to accept or reject any or all proposals/quotations and to impose additional terms and conditions as it may deem proper.

Very truly yours,



GIL P. MONTALBO
Assistant Secretary

PRICE QUOTATION FORM

Date

Assistant Secretary Gil P. Montalbo
Department of Budget and Management
Mabini Hall, Malacañang, Manila

Sir/Madam:

After having carefully read and accepted the terms and conditions in the Request for Proposal, hereunder is my quotation for the services as follows:

Qty	Description	Scope of Work	Total Price
1	Strategic Planning	<ol style="list-style-type: none"> 1. Undertake review of the internal planning process of the Department, including the planning templates used, the monitoring and evaluation system and the corporate planning schedule 2. Prepare a process design for and facilitate the three-day DBM Strategic Planning Workshop 3. Assist the Department in drawing the broad strategies for the next three years and in crafting the Business Plan for 2013 4. Design a creative and effective strategic plan communications strategy 5. Prepare a user-friendly planning guide, with step-by-step procedures in preparing unit and individual work plans based on and anchored with the annual Business Plan 6. Submit an overall project documentation report of all the activities completed, with recommendations on how to strengthen the planning culture in the DBM 	
		GRAND TOTAL	

(Amount in Words) _____

The above-quoted prices are inclusive of all costs and applicable taxes.

Very truly yours,

Name of Consultant

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TERMS OF REFERENCE

Strategic Planning for the Department of Budget and Management

I. Background

It has been two years since the Department of Budget and Management (DBM) laid out the vision, mission and the broad strategies that made up its Strategic Plan 2011-2016. Between then and now, a number of new reform initiatives have been introduced: Bottom-up Budgeting, Program Budgeting and the results-based performance management system just to name a few. Add to that the intensifying efforts to carry on ongoing reforms – OPIF (results-based budgeting), transparency and accountability, stakeholder engagement, etc.

Given the various reform initiatives that the Department is ardently pursuing in order to steer the bureaucracy and the country to attain inclusive growth towards poverty reduction, planning for the strategies to execute these programs is critical. Taking a moment to evaluate the impact of these programs on our goals and overall government objectives is equally essential.

The need for an effective planning process has been further underscored by the unveiling of the *DBM 100*, a program that aims to develop DBM into the performance leader in government by looking into and enhancing the organization's capacity to deliver its mandate. Part of this is fostering a shared understanding of and commitment to the vision and objectives of the Department. With valuable inputs coming from the results of the organization climate survey, the officials can go on to prepare an informed Plan for the next three years, beginning with the Business Plans for 2013.

This Terms of Reference is for a national consultant with expertise in organizational development and strategic planning to assist the DBM in reviewing and redesigning its planning framework and process, and strengthening the mechanisms for monitoring and evaluating results.

II. Objectives

At the end of the engagement, the service provider should have been able to:

1. Review the current planning process of the DBM and recommend necessary improvements to strengthen its planning culture
2. Assist the DBM Management Committee in the review of the strategic objectives of the Department up to 2015
3. Aid the DBM in preparing an effective communications strategy in cascading the DBM Strategic Plan to all its officials and employees

III. Scope of Work

The service provider will undertake a review of the internal planning process of the Department, including the planning templates used, the monitoring and evaluation system and the corporate planning schedule. A report with recommendations on how to strengthen the planning culture in DBM shall be submitted.

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The service provider is also expected to prepare a process design for and facilitate the three-day strategic planning workshop, which will be attended by Senior Officials and the Directorate. As a result of the workshop, the consultant will help draw the broad strategies for the next three years and help craft the milestones for the next three years and the Business Plan for 2013.

To help present the plan to the employees and heighten their level of engagement with the planning and execution of programs and projects, the service provider shall design creative and effective means to communicate the plan to the employees. A user-friendly planning guide, with step-by-step procedures in preparing unit and individual work plans based on and anchored with the annual Business Plan, shall also be prepared to help cascade the plan.

By the end of the engagement, the service provider shall submit an overall project documentation report of all the activities completed.

IV. Project Schedule and Output

The engagement will be for a period of six weeks. It is expected to proceed from the third week of February to fourth week of March 2013. The service provider and DBM shall observe the following schedule:

SCHEDULE	ACTIVITY	OUTPUT
Weeks 1-2	Data gathering, which would include interviews with DBM Officials	Inception report
	Pre-strategic planning meetings with functional groups	Pre-planning meetings held
	Review of the planning framework and templates	Revised planning framework and templates
Week 3	Preparation and submission of the process design of the strategic planning workshop for DBM's approval	Strategic planning workshop process design
Week 4	Conduct of Strategic Planning Workshop	Workshop conducted Draft 2013 Business Plan
Week 5	Preparation of the cascading and communications plan	Strategic Plan cascading plan and communications strategy
	Submission of planning guide	User-friendly planning guide
Week 6	Submission of Final Report	Approved Final Report, which would include the documentation of the activities completed; the monitoring and evaluation system; and recommendations on how to improve the planning culture

V. Implementation Arrangements

The Department and the service provider shall observe the following working arrangements:

1. The implementation of the engagement will be supervised by Assistant Secretary Gil P. Montalbo. The service provider will primarily work with and report to Asec. Montalbo and the Planning Division.
2. The Planning Division shall provide the necessary reports and information required by the service provider to complete their tasks. In addition, the Planning Division shall ensure the participation of the concerned DBM officers and staff in all of the activities.
3. All information and other data gathered and prepared in the conduct of the activities of this project shall be the sole property of the DBM. The service provider shall not have the right to disclose any information pertaining to the herein engagement without clearance from DBM.
4. All DBM organizational information handled by both parties must be treated with confidentiality.
5. The DBM will assess the quality of work and performance of the service provider (1) midway through the project schedule and (2) upon submission of the overall documentation report. The assessment shall be made through a feedback meeting between the DBM and the service provider at a venue and a schedule that is agreeable to both parties.

VI. Required Expertise and Skills

The service provider must be a senior expert in the areas of organizational development and strategic planning, with at least 10 years of experience in consulting work in the areas of expertise. He/She must possess knowledge and understanding of the DBM mandate and the OPIF (managing for results). The consultant must be at least a master's degree holder with a proven track record in performance management and capacity-building. Work experience with government agencies is an advantage.

VII. Professional Fee

The organization development consultant will be paid an amount of **FOUR HUNDRED NINETY FIVE THOUSAND PESOS** (Php 495,000.00), inclusive of VAT. Thirty percent (30%) of the contract cost will be paid upon submission of the Inception Report; the remaining 70% upon DBM's acceptance of the final report. All expenses related to the conduct of the workshop will be charged against the DBM Component of the EC Grant Health Sector Policy Support Programme (ASIE/2005/017-638).

VIII. Submission of Proposals

Expression of interest from proponents shall be submitted to Assistant Secretary Gil P. Montalbo through this email address: cprs@dbm.gov.ph not later than **4 February 2013**.

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