Republic of the Philippines
# Philippine Economic Zone Authority

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| RFQ No. | BAC-2023-03 |
| Date | March 13, 2023 |

**REQUEST FOR QUOTATION**
**Alternative-Small Value [Sec 53.9]**

The Philippine Economic Zone Authority (PEZA) intends to undertake **Negotiated Procurement: Small Value** in accordance with Sec. 53.9 of the 2016 Revised Implementing Rules and Regulations of the Republic Act No. 9184.

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| Name of Project | **Procurement of Consultancy Services - Crafting of PEZA Strategic Plan (2023-2028)** |
| Description/Specifications | **Attached Annex "A"** |
| Approved Budget for the Contract (ABC) | **Php 850,000.00** |
| Deadline of Submission of Bid | **March 23, 2023 5:00 p.m.** |

Interested bidders may submit their duly accomplished and filled-up Annex "A" & "B" on or before the deadline of submission of bids to **Bids and Awards Committee (BAC), 8th Floor Double Dragon Center, West Building, DD Meridian Park Macapagal Avenue, Pasay City.**

Bids must be submitted manually or thru email together with the following documentary requirements:

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| ✓ | Mayor's/Business Permit **or** PhilGEPS Platinum Membership Certificate |
| ✓ | Professional License / Curriculum Vitae |
| ✓ | Omnibus Sworn Statement (Notarized) for ABCs above 50K<br>*Note: For sole proprietorship, please attach notarized Special Power of Attorney (SPA) for authorized representative; For partnership, corporation, cooperative, or joint venture, please attach notarized Secretary's Certificate, Board/Partnership Resolution, or SPA, whichever is applicable.* |
| ✓ | Income / Business Tax Return (for ABC above 500k )<br>Latest Income Tax Return filed via eFPS (*For participants already with an Annual ITR, latest ITR shall refer to the ITR for the preceding Tax Year be it on a calendar or fiscal year. For new establishments which, therefore, have no annual ITR yet, it shall refer to the most recent quarter's ITR*) **or**<br>Latest Business Tax Return filed via eFPS (*Refers to the Value Added Tax (VAT) or Percentage tax returns covering the previous six (6) months. For those with less than six (6) months operations, this refers to the monthly business tax returns filed to date*) |
| ✓ | PhilGEPS Registration Number (*not required if PhilGEPS Platinum Membership Certificate is submitted*) |

Award of contract shall be given to the lowest calculated and responsive bidder per item which complies with the Price Quotation (Annex A), technical specifications (Annex B) and terms and conditions (Annex C).

For any clarification, you may contact BAC Secretariat and or CPD at telephone nos. (02) 8551-3438 / (02) 85513451 local 232 or 8806-5644 or bacsec@peza.gov.ph.

**GM ANIDELLE JOY M. ALGUSO**
BAC Chairperson

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Annex "A"

**PRICE QUOTATION FORM**

(Financial Bid)

**GM ANIDELLE JOY M. ALGUSO**
BAC Chairperson
8th Floor Double Dragon Center, West Building,
DD Meridian Park Macapagal Avenue, Pasay City

Dear Sir:

After having carefully read and accepted the Terms and Conditions of this RFQ and followed Instructions to Bidders, hereunder is our quotation/s (inclusive of VAT) for the following items:

| Description | Bid Price (PHP) |
|---|---|
| Please see attached technical specifications for reference. | Php |
| | **(Inclusive of VAT)** |

NAME OF STORE :_____

ADDRESS :_____

PHILGEPS REG. NO. :_____

TIN :_____

AUTHORIZED SIGNATORY:_____
(Signature over Printed Name)

DATE :_____

CONTACT NOS. :_____

EMAIL ADDRESS :_____

**INSTRUCTIONS:**

(1) Accomplish this Form correctly and accurately.
(2) Do not alter the contents of this form in any way.
(3) Failure to comply with any of the mandatory requirements will disqualify your quotation.
(4) Failure to follow these instructions will disqualify your entire quotation.
(5) Bids exceeding the ABC shall be automatically disqualified.

Annex "B"

# Technical Specifications

## TERMS OF REFERENCE

### 1.0 Project Title

Engagement of a Service Provider to Facilitate the Crafting of the PEZA Strategic Plan (2023-2028).

### 2.0 Background

The Philippine Economic Zone Authority (PEZA) is a government-owned and controlled corporation attached to the Department of Trade and Industry. As an investment promotion agency, PEZA is a service organization committed to facilitating investments, exports and employment in the Philippines through effective management of public and private economic zones, administration of incentives, efficient delivery of services, focused investment promotions, and proactive conduct of developmental activities.

The Philippines has the potential to attract foreign direct investments due to its strategic location, market size and young workforce. PEZA, as the biggest investment promotion agency in the country needs to promote programs that improve the business climate and respond to increased competition for investment among ASEAN countries and emerging economies. The current administration acknowledged the strategic importance of economic zones in enhancing the business and investment climate in the Philippines. The President in his first State of the Nation Address (SONA) on 25 July 2022, emphasized the importance of implementing a sound fiscal management and the vital role of ecozones as drivers of economic growth and development which will strengthen the promotion of the country as an investment destination.

PEZA has instituted organization-wide programs in order to become more responsive, effective, efficient, competitive and innovative in upholding its commitments. As part of its ongoing initiatives, PEZA is implementing a Quality Management System (QMS) for all PEZA processes in all its sites to ensure the delivery of timely and efficient services to its clients.

PEZA has been ISO 9001:2000 certified since 09 December 2008 and upgraded to ISO 9001:2015 in 09 December 2014. We have established business process-level and operational level targets and through QMS and compliance with the Anti-Red Tape law, Ease of Doing Business law and relevant regulations, and have streamlined and optimized our processes.

In August 2018, PEZA engaged the services of a Service Provider to conduct workshops in order to come up with a Strategic Plan for the organization wherein the 4 perspectives are emphasized: customer, process excellence, learning & growth and resource.

## 3.0 Project Objectives

3.1 To craft and formulate the PEZA Strategic Plan (using a Strategy Map) with the participation of selected management and key players in a series of workshops.
3.2 To determine organizational objectives in accordance with PEZA's mandate and a measurable plan of action within a determined period of time.
3.3 To determine the external & internal issues and the needs & expectations of the interested parties that are relevant to PEZA's strategic direction and ensure that analysis of these are incorporated in the documented strategic plan.
3.4 To revisit PEZA's strengths, weakness, opportunities and threats (SWOT) to provide the organization the current and forward-looking situations that could help define its strategic directions.
3.5 To identify the risks and the plans of action to address them.
3.6 To make PEZA more responsive to the new programs and thrusts of the current administration, government compliances/requirements and to align PEZA delivery units' quality objectives to PEZA's strategic objectives.
3.7 To engage the services of a Service Provider that shall facilitate the strategic planning and capacity building sessions.

## 4.0 Scope and Coverage

The services will cover the crafting of PEZA's Strategic Plan under the following phases:

4.1 Preparatory activities that will involve series of interventions / meetings with the PEZA Top Management (Director General, Deputy Directors General (DDGs), Zone Administrators and Group Managers to review the vision / mission and analyze the (SWOT) necessary in crafting the PEZA Strategic Plan. The meetings may also involve the DTI Planning & Management Service and PPRG to gather information such as records of past performances (i.e. investment, employment and exports) and analyze the optimal approach to establish the agency targets. A session to determine the external & internal issues and needs & expectations of the interested parties, as well as the identification of risks and the plans of action will be considered during the preparatory activities.

4.2 Drafting of the Strategy Map – to attain a balanced measure, the strategic objectives shall be identified under the 4 perspectives of the Balanced Scorecard (BSc), as follows: customers, process excellence, learning and growth and resources. A Strategy Map with a list of initiatives will be crafted for this purpose.

4.3 Initiatives Workshop – using the strategy map and the listed initiatives, the metrics, targets and responsible officers will be identified; initial planning and conceptualization of these initiatives will be conducted in this workshop.

4.4 Cascading – full blast cascading of the strategy to the delivery units and clusters to attain the PEZA vision. Delivery units to create their scoreboards

with measurable targets. The unit heads/focal persons will be capacitated to track the performance of respective units.

4.5 Submission of a narrative report including the recommended next steps that PEZA has to take. This will include documentation of meetings and workshops during the course of this engagement.

**5.0 Methodology**

Engage the services of a Service Provider to facilitate the conduct of a strategic planning for PEZA.

The Bids and Awards Committee shall implement the applicable bidding process to facilitate the sourcing of a Service Provider for this purpose.

**6.0 Qualifications of the Service Provider**

6.1 With background and experience in government systems particularly in policy, regulatory and investment promotions;
6.2 Possess experience in providing the tools to formulate a strategy map and plans for PEZA using the Balanced Scorecard Methodology/Performance Governance Scorecard Methodology;
6.3 With knowledge of the Quality Management Systems to be able to guide and align PEZA to the applicable requirements of ISO standards;
6.4 Must have the ability to encourage and motivate others to adopt a strategic vision.
6.5 Must have been engaged by other government agencies / offices in the crafting of a strategic plan and related services.

**7.0 Responsibilities of the Service Provider**

7.1 The Service Provider shall provide PEZA full access to information, data and documents/records acquired or used during this engagement;
7.2 Any adjustment on agreed timelines will be subject to the approval of the Management;
7.3 The Service Provider shall transfer the learnings on the entire coverage of the project through meetings / workshops / presentations / coaching using actual interaction / face to face activity or through the use of online meeting tools;
7.4 Provides PEZA with the tools to formulate the strategic plan;
7.5 Facilitates the planning activity through a series of workshops;
7.6 Maintains the confidentiality of the documents that will be used and reports that will be generated;
7.7 Submits the final narrative report of this engagement;
7.8 Maintains close coordination with the Corporate Planning Department;
7.9 The Service Provider shall submit the following:

- Mayor's/Business Permit or PhilGEPS Platinum Membership Certificate;
- Omnibus Sworn Statement (Notarized) for ABCs above P500K (Note: for sole proprietorship, bidders must attach

notarized Special Power of Attorney for authorized representative; for partnership, corporation, cooperative, or joint venture, bidders must attach notarized Secretary's Certificate, Board/Partnership Resolution or SPA, whichever is applicable).

- PhilGEPS Registration number (not required if PhilGEPS Platinum Member)
- For individual Service Provider, only the BIR Certificate of Registration shall be submitted in lieu of DTI Registration and Mayor's Permit.
- Recommendations/certifications from at least 1 (one) government client *(e.g. investment promotion agencies)* who have engaged the services of the Service Provider stating that subject Service Provider has satisfactorily rendered service;
- Qualifications of personnel that will be assigned to this engagement.

**8.0 UNITs INVOLVED**

The Corporate Planning Department (CPD) will oversee the implementation of this activity and provide necessary documents and administrative support, as needed.

8.1 Coordinates with the Service Provider and other key persons in carrying out this activity;
8.2 Prepares and disseminates communications as may be deemed necessary.
8.3 Arranges schedule of meetings;
8.4 Draws up the agency's budget for this activity; and
8.5 Prepares vouchers for payment of expenses.

The Personnel and Administrative Services Group (PASG) in coordination with the CPD will be in-charge of the venue and provide logistical support (such as food, supplies and materials, office equipment, transportation, etc.) as needed. This will also include other tasks that may be deemed necessary when activity will be done outside PEZA premises.

The Promotions and Public Relations Group (PPRG) and Enterprise Services Division (ESD) will be in-charge for the past and present data/information on investment, exports, employment relevant to this workshop.

**9.0 PROPOSED ACTIVITIES and DELIVERABLES**

| Activity | Deliverables | Indicative Time Frame |
|---|---|---|
| Preparatory Meeting<br>- Pre-work meetings and levelling expectations of the top management<br>- Review of vision/mission | Draft Strategy Map | 1st month |

| | | |
|---|---|---|
| - Determine the internal & external issues and needs & expectations of the interested parties<br>- Review the SWOT analysis<br>- Identify risks and plan of action<br>- Review of the current strategy and gathering of relevant materials | | |
| Drafting of the Strategy Map<br>- Prepare the draft Strategy Map for comments and inputs<br>- Levelling the expectation with the Top Management based on the draft Strategy Map and Initiatives | Strategy Map with List of Initiatives | 1st month |
| Initiatives Workshop<br>- Present the key initiatives<br>- Determine lead measures<br>- Identification of baseline, targets, measure and focal persons) for each initiatives<br>- Planning and conceptualization of the initiatives | PEZA Strategy Map and Scorecard | 2nd month |
| Cascading<br>- Create delivery unit scoreboard to express the progress of each unit<br>- Capacitate unit heads/focal persons to track the performance of respective units | Delivery Units' Scoreboard | 2nd month |
| Preparation of Final Output | Narrative Report | 3rd month |

**10.0 DURATION**

The selected service provider shall perform the services outlined herein for a period of three (3) months commencing upon receipt of the Notice to Proceed (NTP). The commencement date may be adjusted or revised as agreed upon by PEZA and the winning service provider.

**11.0 BUDGET**

11.1 The cost of this engagement shall be charged to the PEZA Corporate Operating Budget (COB).
11.2 The amount of this engagement with the service provider is inclusive of tax.
11.3 Price to be quoted excludes travel and accommodation costs and food expenses;
11.4 Out of pocket expenses (based on allowed government expenses/rates)

for provider-related activities shall be charged to the PEZA COB. Likewise, all other expenses related thereto such as payment for the venue, food, supplies, materials, etc.) shall be charged to the COB;

11.5 The appropriate mode of procurement will be used for this purpose;

11.6 All payments shall be in accordance with the existing government accounting and auditing rules and regulations.

## 12.0 TERMS OF PAYMENT

Payment will be based on submission of deliverables.

| Activity | Deliverables |
|---|---|
| Preparatory Meeting | 10% |
| Drafting of the Strategy Map | 25% |
| Initiatives Workshop | 25% |
| Cascading | 25% |
| Preparation of Final Output | 15% |

AMA/atsv

AUTHORIZED SIGNATORY:_____

(Signature over Printed Name)

DATE :_____

Annex “C’’

# Terms and Conditions

TERMS AND CONDITIONS

- Bidder shall type or write in "Ink" the following on the Price Quotation Form:
  - Name of Store
  - Address
  - PhilGEPS Registration No. / Organization No.
  - TIN
  - Authorized Signatory
  - Date
  - Contact Nos.
  - Email Address

- Submit the filled-up (Annexes A and B) Forms manually or thru email at the following address:

- **Manually** : 8th Floor Double Dragon Center, West Building, DD Meridian Park , Macapagal Avenue, Pasay City

  **Email:** cpd@peza.gov.ph

- Delivery Period: 90 calendar days upon receipt of NTP/ Contract/ PO/ WO

- Terms of Payment: Through Cheque / 15 working days upon receipt of Original Sales Invoice Statement.

- Winning Bidder must deliver the items/services to the following address:
  **8th Floor DoubleDragon Center, West Building, DD Meridian Park, Macapagal Avenue, Pasay City**