

July 27, 2023

## REQUEST FOR QUOTATIONS

The Philippine Council for Health Research and Development (PCHRD), through its Bids and Awards Committee (BAC), requests PhilGEPS registered suppliers to submit **quotations for the Consultancy Services for the Training Workshop on Strategic Planning and Execution with a total approved budget for the contract (ABC) in the amount of One Hundred Thousand Pesos (P 100,000.00).**

### Outputs and Deliverables:

- **Please see attached Terms of Reference (TOR)**

Qualified bidders should submit their quotations to the address below **on or before August 3, 2023 (Thursday), 10:00 AM.** Failure to strictly comply with the deadline and general conditions shall automatically disqualify the bidder/s from the bidding process. Winning bidder will be required to submit additional requirements as stipulated in the IRR of RA 9184.

PCHRD reserves the right to reject any or all quotations, to waive formality therein and to accept offers that may be considered most advantageous to the government.

For further information, please refer to:

**Mr. Cirio D. Pangan Jr.**

Secretariat, Bids and Awards Committee  
Philippine Council for Health Research and Development  
2<sup>nd</sup> Floor, PCHRD Saliksik Building, Sikap Street,  
DOST Main Compound, Gen. Santos Ave., Bicutan, Taguig City  
Email: [procurement@pchrd.dost.gov.ph](mailto:procurement@pchrd.dost.gov.ph)  
Tel. Nos. 837-7536 or 837-7537 loc. 504 or 506  
Fax No. 837-7536 or 837-2924

(sgd.)

**MARIA VIOLETA G. INTIA**  
Chair, BAC

## TERMS OF REFERENCE

### Consultancy Services for the Training Workshop on Strategic Planning and Execution

#### I. Background/Rationale

The Philippine Council for Health Research and Development is one of the three sectoral councils of the Department of Science and Technology (DOST). Being a forward-looking, partnership-based national body responsible for coordinating and monitoring research activities in the country.

PCHRD is mandated to perform the following functions:

- Formulate agenda, plans, policies, and strategies for health Research;
- Mobilize Resources to support health research;
- Develop and strengthen capacity for health research;
- Program and allocate government and external funds for R&D, and
- Monitor and Evaluate Health research activities.

PCHRD is also the focal point for health research and development (R&D) in the country whose functions, among others, include: providing leadership and direction in health and related R&D activities; developing human and infrastructure resources of health research network; and implementing research utilization program to ensure research products are properly disseminated among and utilized by their intended users.

The Council's function on conducting research and development activities requires continual development of its staff in planning and executing the program effectively and efficiently. By having the necessary skills and through continuing development, they can manage and lead the implementation of plans and utilization of resources to achieve the goals and objectives of the office and the organization itself. Furthermore, they can improve the analyzation of potential challenges in work execution by gathering and creating strategies to calculate and/or mitigate the risks.

The **Training Workshop on Strategic Planning and Execution** will provide the staff of the Council with the skills and abilities to set and prioritize goals, formulate strategies, identify scope, and manage resources to meet individual, team, or organizational targets and objectives.

## **Objectives**

This Training Course aims to provide the following to the DOST-PCHRD Employees:

- **Developing a Strategic Vision:** Create a clear and forward-looking plan outlining how their team/department can contribute to the organization's future growth and success.
- **Setting Relevant Objectives:** Establish realistic and attainable goals that align with the overall vision, ensuring they contribute to the organization's progress.
- **Crafting an Actionable Framework:** Develop a practical and implementable framework that outlines the steps needed to achieve the set objectives.
- **Identifying Potential Pitfalls:** Recognize and address potential obstacles that may hinder the successful execution of the strategic plan.
- **Designing an Efficient Execution and Monitoring & Evaluation (M&E) Plan:** Develop a well-thought-out plan for implementing the strategy effectively, ensuring all necessary resources and actions are coordinated, and the metrics how to monitor and evaluate effectiveness of said plan;
- **Identifying Key Individuals/Teams:** Identify and involve capable and skilled individuals or teams who can effectively carry out strategic tasks.
- **Effective Communication of the Strategic Plan:** Clearly and efficiently communicate the strategic plan to all stakeholders, including those in higher positions (uplines) or lower positions (downlines).

## **II. Expected Outputs / Deliverables**

1. Conduct the Program courses in accordance with the implementation schedules and modules / sessions agreed;
2. Source, select and manage the subject matter experts who shall serve as the facilitator for the program;
3. Provide technical staff to establish and maintain a learning environment and provide support to the facilitator and participants during the conduct of the program;
4. Provide detailed training activity plan before the actual implementation of the program;
5. Provide each registered participant with appropriate learning materials needed for the conduct of the program/course;

6. Submit a terminal Report with documentation of the highlights of the proceedings of the program/course, result of Pre-tests and Post tests, and post evaluation of its conduct.

#### **IV. Scope of work**

##### **Training Provider shall:**

1. Design the program/course/modules/detailed training activity plan for the conduct of Strategic Planning and Execution Training;
2. Identify, analyze and validate the learning and development needs of the **DOST-PCHRD** in relation to the specific program/course to be conducted under this Agreement;
3. Propose a customized design that will specifically address the **DOST-PCHRD's** learning and development needs in the form of a Program/Course Brief consisting of the Performance Objectives, Enabling Objectives, Target Participants and Course Content. As may be required, **the provider** shall provide a copy of the detailed Design Matrix. The Design Matrix shall consist of Module Objectives, Module Title, Module Outputs, Module Topics, Learning Methodologies and Resource Requirements;
4. Conduct the training workshop on the following topics with engaging lectures, activities, and exercises, subject to further modification, as needed, based on the discussions of the needs of DOST-PCHRD :
  - a. Module 1: Phase 1 – Developing a Strategic Vision
    - Changes in business environment
    - Identifying Strategic Vision
    - Strategic Vision vs Mission
    - Communicating Vision
  - b. Module 2: Phase 2 – Setting Objectives
    - Purpose of Setting Good Objectives
    - Reasons Why Some Objectives Fail
    - Creating concrete performance outcomes
    - Financial objectives vs Strategic Objectives
    - Examples of Financial vs Strategic Objectives
  - c. Module 3: Phase 3 - Crafting a Strategy
    - Strategy making and ideas
    - Key Activities in Crafting a Strategy
    - Forming a Strategizing Team
    - Tasks of Business Strategy
  - d. Module 4: Phase 4 Part 1 – Implementing and Executing Strategy
    - Action Driven, Operations Oriented Strategies
    - Goal Setting
    - Optimizing Strengths vs. Weaknesses

- Leadership and Generalship
  - Identifying Areas to Focus
- e. Module 5: Phase 4 Part 2 - What It Takes for Strategies to Succeed
- Aligning of Initiatives
  - Aligning of budget and performance
  - Allocate Resources and Manage Conflict
  - Strategic Production and Operation Issues
  - Aligning Structure/Job Design to Strategy
  - Energizing Employees to Execute Strategy
  - Measuring and Monitoring Performance
  - Identifying and Managing Risks
  - Balancing Innovation and Control
- f. Module 6: Phase 5 – Strategic Planning at Work
- Application of Strategic Planning Methodologies
  - Situation – Target - Path
  - Draw – See Think – Plan
5. Accommodate up to a **maximum of 50 Participants** from the DOST-PCHR provided that the list and profile of said participants are submitted three (3) working days prior to the conduct of the program/course;
  6. Conduct pre-test/post-test/post-training evaluation;
  7. Perform and complete the scope, expected output/deliverables and services contemplated under the terms of reference and contract with the highest standards of professionalism and ethical competence and integrity;
  8. Protect confidential information disclosed during the discussions; and
  9. Provide all certificates of completion within 10 working days after the completion of the training as a requirement for the release of the payment.

## V. **Desired Qualifications of Service Provider**

Prospective Consultants should possess the following:

1. Has educational background or area of specialization in the training conducted;
2. Expertise in English, project management, and planning and executing programs;
3. Excellent facilitation, program/activity management, and oral communication skills;
4. Not involved in critical incidents that might otherwise tarnish or put to question his/her credibility, character, ethical behavior or intellectual integrity as a learning service provider.
5. Experienced in consultancy work for training/workshop involving in project management, planning and execution management and development;
6. Tactful and respectful to participants; and

7. Has substantial and reputable existing clients (provide proofs of certificate of satisfactory customer/client rating)


**VI. Duration of the Training**

The Provider must conduct the training in **September 2023. Total of 24 training hours.** (Module 1: 4 hours / Half Day; Module 2: 4 hours / Half Day; Module 3: 4 Hours /Half Day; Module 4: 4 hours / Half Day; Module 5: 4 hours / Half Day; Module 6: 4 hours / Half Day )


**VII. Cost of the Training**

Total amount of **One Hundred Thousand Pesos Only (Php 100,000.00)** which will cover the program / course design and delivery including the provision of learning materials, certificate of completion, honoraria of Subject Matter Expert / Co-facilitator and submission of a Terminal Report.

**Prepared by:**

  
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**Noted by:**

  
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