

# TECHNICAL SPECIFICATIONS

## PROCUREMENT OF SERVICES OF CONFERENCE FACILITATORS FOR THE EXECUTIVE PLANNING CONFERENCE FOR CY 2021

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## TECHNICAL SPECIFICATIONS

### 1. Project Title

Procurement of Services of Conference Facilitators for the Executive Planning Conference for CY 2021 in October 2020

### 2. Total Budget

The total budget for the project amounts to Three Hundred Thousand Pesos (Php300,000.00).

### 3. Brief discussion why the services to be procured is necessary

The Government Service Insurance System (GSIS) will hold its Executive Planning Conference (EPC) for CY 2021 in October 2020 for GSIS Executives to conduct strategic planning. The strategic planning process in GSIS has already started when the GSIS Board of Trustees conducted their strategic planning activity on 28-29 July 2020 focusing on the assessment of strategic position and development of strategies and priorities for 2021. The strategic planning of the Executives will focus on development and prioritization of action plans and commitment setting of the Offices which will be included in the Office Performance Scorecards.

A team of facilitators with expertise in the conduct of strategic planning process will guide the Executives in the crafting and discussion of action plans, strategic initiatives, measures, and targets that are aligned with the strategic priorities set by the Board.

The GSIS will benefit from external facilitators who have experience in handling strategic planning and workshop activities using web conferencing applications such as Zoom. The facilitators will have a more objective view of the discussions and could offer a different or fresher perspective on the matters to be discussed. With an expert team's guidance, GSIS executives could participate fully and be exposed to a different style of engagement or sharing of inputs and ideas.

### 4. Scope of the project

The project includes the services of conference facilitators who shall accomplish the following:

4.1. Conduct of pre-planning activities including the development of conference design including program design, schedule and logistics taking into account the following:

4.1.1. GSIS strategy/strategic plan for 2021 and beyond based on the GSIS Board of Trustees' (BOT) strategic priorities and other key agreements identified during the BOT strategic planning for 2021 and beyond;

- 4.1.2. GSIS Strategy Map;
  - 4.1.3. GSIS Performance Scorecard;
  - 4.1.4. Conduct will be through video conferencing using web conferencing applications preferably Zoom;
  - 4.1.5. Conduct will be a two (2) one-day event with at least 5 working days in between the dates of conduct to give the Offices preparation time for the development of proposed action plans for CY 2021; and
  - 4.1.6. Program shall include identification, presentation and discussion of proposed priority strategic initiatives and action plans of the Offices.
- 4.2. Organization and facilitation of the two-day strategic planning workshop activities based on developed conference design which shall include the following:
- 4.2.1 Facilitate discussion of the strategic plan, objectives, initiatives and other priorities identified by the Board for CY 2021 and beyond including the GSIS Performance Scorecard for 2021;
  - 4.2.2 Assist in the development of strategic initiatives or action plans for CY 2021 and beyond that are aligned with the strategy identified by the GSIS BOT; and
  - 4.2.3 Present and discuss the results of the strategic planning workshop.
- 4.3. Documentation of the entire event; and
- 4.4. Submission of conference report/s (soft and hard copy).
- 5. Detailed specifications of the items, materials, equipment/hardware/software, accessories and/or services to be procured**
- 5.1. Target Participants: There will be around 60 participants from GSIS. The President and General Manager and the Heads of Offices shall be the main participants of the conference. Staff members from the Office for Strategy Management–Strategic Planning and Control Department (OSM-SPCD) shall also attend the event as GSIS Secretariat. Other GSIS personnel may also be invited to provide technical expertise relevant to the discussions.
- 5.2. Service Provider’s Qualifications: GSIS needs facilitators who meet the following qualifications:
- 5.2.1. Facilitators shall have experience in handling strategic planning workshops in large group particularly through video conference;
  - 5.2.2. Has previous experience in executive planning sessions both for government and private organizations; and
  - 5.2.3. With strong background in consulting, training, coaching and conducting team-building activities for executives.
- 5.3. Service Provider’s Responsibilities:
- 5.3.1. Development/Design of the program and conduct of the actual strategic planning activities;
  - 5.3.2. Provision of workshop manuals, hand-outs and other planning materials in coordination with the End-User (OSM-SPCD);

- 5.3.3. Conduct of pre and post workshop assessment/discussions in coordination with the End-User (OSM-SPCD);
- 5.3.4. Documentation of outputs and final report of event activities submitted within two (2) weeks after the event;
- 5.3.5. Treat all information obtained from this activity and related exercises with utmost confidentiality;
- 5.3.6. Provide copies of the Facilitators' resume or curriculum vitae which should reflect the years of experience in handling strategic planning conferences and team building activities; and the list of companies or organizations the facilitators have conducted the same or similar workshops/activity; and
- 5.3.7. Assign a point person who will coordinate with the End-User (OSM-SPCD).

5.4. Mode of conduct: In view of the restriction in conducting public events and mass gatherings, the EPC for CY 2021 shall be conducted via video conferencing using web conferencing applications preferably Zoom.

## **6. Manpower requirements**

The Service Provider must be composed of at least 3 to 5 members including the Main Facilitator and Support Facilitators.

## **7. Support service requirements**

The Service Provider through a designated Point Person must accomplish the GSIS Supplier Registration Information Sheet (SRIS) and submit the documentary requirements for vendor registration.

## **8. Warranty and after-sales service requirements**

Not applicable.

## **9. Clear statement of the required standards of workmanship, materials and performance of the goods and services to be procured**

Included under Item 5.3

## **10. Brand and specifications of the existing items, materials, equipment/hardware/software and accessories, if the former are related to the goods and services to be procured**

Not applicable.

## **11. Drawings/Plans and other necessary information**

Not applicable.

## **12. Schedule and place of delivery**

The following activities shall be conducted via video conferencing or at the GSIS Office, Pasay City:

Pre-workshop discussion	– One (1) week before the actual event
Actual event	– October 2020 via video conferencing
Post-workshop assessment	– One (1) week after the actual event
Submission of reports	– One (1) week after the Post-workshop assessment at the GSIS Office, Pasay City

## **13. Terms of Payment**

13.1. GSIS will be billed under the Send Bill arrangement. Full payment will be made upon completion of the service and will be settled through a Corporate Check payable to the Name of the Service Provider upon submission of complete and appropriate billing documents in the GSIS Central Office.

13.2. Payment shall be subject to applicable taxes, auditing and accounting rules and regulations and existing rules and regulations of GSIS relative to payment of procurement contracts.

## **14. Responsibilities of the End-User Unit during project implementation**

The OSM-SPCD as the End-User Unit shall ensure that the Service Provider meets all the specifications stated herein.

## **15. Penalty for Delay**

In the event of, but not limited to, any acts of God, government acts under its police power, war, terrorist attack, fire, flood, explosion, civil commotion and any other cause or causes beyond reasonable control, no party shall be liable to the other party for any delay or non-performance of its obligation.

## **16. Data Privacy**

The winning bidder/supplier must comply with all the provisions of Republic Act No. 10173, known as the “Data Privacy Act of 2012” and its Implementing Rules and Regulations.

# IMPORTANT REMINDER

The Government Service Insurance System (GSIS) warns the public/bidders of unscrupulous individuals and groups posing as officers/employees of the GSIS soliciting money for alleged aid for whatever purpose. **Do not give anything to these unscrupulous individuals and groups.**

GSIS is fully compliant with the ***NO SOLICITATION AND GIFT POLICY***. In this regard, **GSIS officials and employees are prohibited** from “directly or indirectly soliciting gifts, favors or benefits from stakeholders and directly or indirectly soliciting, accepting or receiving any gift, favor or benefits from any party which may influence the performance of their official functions or which may be perceived as influencing their past, present and future official functions.

We thus enjoin the cooperation of the public/vendors/suppliers to report these individuals/groups to GSIS through the **Office of the Vice-President, General Services Office at (02) 976-4900 local 4971** and **Materials Management Department (MMD) at (02) 976-4900 local 3608.**