

## **TERMS OF REFERENCE**

### **CONSULTANCY TO FACILITATE THE ANNUAL TPB QMS PLANNING SESSIONS**

#### **Background:**

The Tourism Promotions Board is in the process of securing approval for its 2018-2022 Strategic Marketing Plan. Its Marketing Plan for the year 2018 was approved by virtue of TPB Board Resolution 152 series of 2018 approving TPB's 2018 Work Program Targets.

TPB is now in the process of preparing for 2019 Work Program through its Quality Management System Planning Workshop tentatively scheduled for end of July to 1<sup>st</sup> week of August 2018. The purpose of this workshop is to review the vision and mission of TPB, its existing programs, and to develop goals, objectives and directions which will serve as the guide to program implementation for 2019 and 2020. Workshop participants will comprise of TPB's management team and senior to junior officers.

TPB is selecting an external consultant who can develop the workshop frameworks and materials and take the lead in facilitating the QMS Annual planning workshops. The intention is for workshop participants to consider TPB's existing programs and to define the direction and priorities of the organization for 2019 and 2020. In addition to the workshop, the consultant will conduct a desk review of the external and internal context, familiarize him/herself with TPB's existing programs and consult with TPB personnel in order to develop the final annual planning document.

The purpose of the workshop is to undertake a review of the progress of TPB in terms of achieving its mission and vision. The workshop will also address key aspects relevant to the achievement of its annual targets and effective implementation of its 2019 work program and prepare for 2020.

#### **Objectives of the QMS Planning Intervention:**

- To analyze the internal/external context of TPB;
- To help define the concrete plans and priorities of the organization that will be the basis of the operational planning of all TPB's unit, especially for the four (4) department under comprising the Marketing and Promotions Sector;
- Implementation progress review of TPB 2018 Work Program and implementation plan development for 2019 and 2020; and
- Address identified or flagged outstanding issues going forward

#### **Scope of Work**

- Familiarization with TPB and its existing programs, including review of organizational documents and meetings with key staff;
- In consultation with the TPB CPBD Department, design and document an appropriate process for the workshops leading to the desired results;
- Develop workshop methodologies and materials;

- Facilitate the a 3-day Organizational Planning Workshop with the TPB Management Committee and some senior officials to prioritize projects and programs for FY 2019-2020
- Facilitate a 2-day Creative Thinking and Innovation Workshop which will help the participants cultivate strategic thinking skills in relation to planning wherein skills gained will be applied in crafting 2019 departmental plans
- Facilitate a 2-day “culminating” post-planning workshop to integrate everything that was learned during the first 2 sessions.
- Supervise and provide critique on workshops outputs to ensure alignment of Programs, Activities, and Projects (PAPs) with the strategic thrusts of TPB;
- Draft reports on all sessions. The documentation will be a full account of all the original discussions in which are to be ready and available in a draft form at the end each session; and
- Final outcome report

### **Outputs and Deliverables:**

1. Conduct preparatory meetings with some members of TPB Board, COO/OIC of TPB, OIC/DCOO for both Corporate Affairs and Marketing and Promotions as well as the head of CPBD Department to align and define “broad strokes” in priorities and strategies for the Corporation.
2. Analysis of TPB Documents (i.e., Balance Scorecards, Corporate and Functional Quality Objectives, OPCR, Program Expenditure Plan or DBM BP Form 201, etc.)
3. Develop design for the abovementioned workshops/sessions.
4. Successful facilitation of the three (3) workshops.
5. Coaching services, technical advice and support to participants.
6. Progress and completion reports to focus on highlights and recommendations to TPB and follow-through activities.
7. Submit a Terminal Report covering the proceedings of the workshops, outputs during the workshop activities and meetings and recommendations on how to sustain and implement the learnings gained or any immediate “next steps”.

### **Duration of Work**

The Consultant or Consulting Firm shall be engaged for a maximum of 3 months.

### **TPB’s responsibilities:**

1. Oversee that the pre-work required prior to the event is completed;
2. Provide the necessary documents and materials needed by the Consultant;
3. Logistical preparations including scheduling of participants for interviews and Focus Group Discussion (if any)
4. Invite and ensure the attendance of the targeted participants;
5. Provide the transportation and accommodation (when needed), venue and meals of the participants for the duration of the workshops;
6. Provide the transportation, accommodation and meals of the consulting team (maximum 6 persons) for the duration of the workshops;

7. Purchase and reproduction of materials and manuals needed for the workshops
8. Provide the Consulting team with a working area in TPB during visit
9. Ensure the training equipment, such as LCD projector, projector screen, microphones, speaker, flip chart stands and whiteboard and other materials required by the facilitator are available for use during the program; and
10. Pay the professional fee and shoulder the costs of other expenses incidental to the conduct of activities specified in this TOR

### Terms of Payment

As remuneration for services rendered, the consultant or consulting firm shall receive a professional fee in the amount of Five Hundred Thousand Pesos (PhP500,000.00), inclusive of all applicable taxes.

The TPB reserves the right to withhold all or a portion of payment if performance is deemed unsatisfactory, if work/output is incomplete, not delivered or failed to meet deadline/s set; or all other factors in breach of the TOR.

**Out-of-Pocket Costs:** additional travel expense (ticket and ground arrangement expenses) to be incurred upon request of TPB that are not included in the Financial proposal of the winning supplier should be approved by TPB prior to implementation.

The indicative payment scheme is as follows:

| Output/Milestone   | % of Payments |
|--|---------------|
| Upon approval of proposed timelines/Gantt Chart  | 15%           |
| Upon completion of preparatory meetings with some members of TPB Board, COO/OIC of TPB, OIC/DCCO for both Corporate Affairs and Marketing and Promotions as well as the head of CPBD Department; and<br>Approval of the design/plan for the 3-day Organizational Planning Workshop | 25%           |
| Upon completion of the 3-day Organizational Planning Workshop and submission of progress report  | 20%           |
| Upon completion of the 2-day Creative Thinking and Innovation Workshop and submission of progress report   | 15%           |
| Upon completion of the 2-day “culminating” post-planning workshop and submission of progress report  | 15%           |
| Upon submission and approval of the Engagement Terminal Report   | 10%           |
| <b>TOTAL</b>   | <b>100%</b>   |

### Qualification of Consultant/Consulting Firm:

- Must have at least three (3) years’ consulting experience in Organizational Development
- Minimum accumulated three (3) years’ experience and minimum two (2) years recent experience in conducting and facilitating similar planning workshops and meetings in private and government sector
- Must be knowledgeable in government operations, policies and procedures

- Must have assisted at least 1 government agency in the establishment of Annual Planning and/or Strategic Planning as well as other skills building workshop particularly on Creative Thinking and Innovation
- Must have ongoing consultancy and training services with government agencies for the establishment of Annual Planning
- Must have working knowledge on Performance Management System, Performance Scorecard and ISO 9001:2015 particularly on Risk-Based Thinking Approach

**Invitation to Suppliers:**

The Consultant / Consulting Firm will be expected to submit technical and financial proposals which shall include:

- A brief profile and description of the company demonstrating their ability to achieve tight deadlines and flexibility in meeting the client’s needs;
- A brief profile of key personnel who will be assigned in the projects showing areas of specialization;
- List and evidence of relevant work experience for at the three (3) years (2015 timeline onwards);
- The winning consultant/consulting firm shall be determined in accordance with the process of R.A. 9184 and its Revised IRR.
- Proponents will be required to make a presentation (maximum of 15 minutes) of their Plan Approach for the project. The proposals shall be evaluated using Quality Cost Based Evaluation (QCBE). The winning proposal must attain a hurdle rate of 85% based on the following set of selection criteria with their corresponding weight assignment:

| Proposal           | Weight |
|--------------------|--------|
| Technical Proposal | 85%    |
| Financial Proposal | 15%    |

**PROJECT OFFICER/CONTACT PERSON:**

MS. MARIVIC M. SEVILLA  
 OIC – Corporate Planning & Business Development Department  
 Email address: mavic\_sevilla@tpb.gov.ph  
 Tel. No: 525-6443 / 525-9318 local 270