

# **ANNEX A: TERMS OF REFERENCE**

## **TERMS OF REFERENCE**

**19<sup>th</sup> PHILIPPINE TRAVEL EXCHANGE (PHITEX) 2020, Virtual Edition  
22-24 September 2020  
Manila**

### **Services of an Event Management Company**

#### **I. BACKGROUND**

PHITEX is the biggest government-organized travel trade event in the country first held in 1996. Patterned after the ASEAN Tourism Forum, this event hosts qualified international buyer delegates worldwide to participate in table-top business appointments with accredited Philippine tourism suppliers. Invited foreign participants are also given a chance to experience what the country can offer as a tourism destination during pre and post tours featuring key Philippine attractions and destinations.

Research reveals that 68% of business events have been cancelled or postponed due to the very recent COVID-19 pandemic. This has caused significant challenges for the tourism industry; thus, digitization is now one of the most effective ways to bridge us into the new normal.

For the first time, TPB shall host PHITEX Virtual Edition. This online event shall provide an opportunity to experience innovative ways of developing new business connections and update global buyers with the latest Philippine tourism offerings. Also, it can maximize trackability where every registration, login, click, download and share, and other event tracking functionality has become easier than ever.

TPB needs services of an EVENT MANAGEMENT COMPANY to assist in the effective management of the following: overseeing the Travel Exchange (Business-to-Business Sessions) by delivering the necessary physical and technical requirements.

#### **II. COMPONENTS OF PHITEX, VIRTUAL EDITION**

1. 2-day Travel Exchange
2. Five Webinars
3. Four Interviews
4. Two roundtable discussions
5. Speed networking sessions

6. Online games (Contests on “How Well Do You Know the Philippines?” Questions will be based on the information found on the platform.)
7. Surveys for both buyers and sellers to learn more about the participants, and gather information for market studies.
8. Opening and closing programs.
9. Virtual tours (contents will come from TPB)
10. Videos-on-demand: cooking demos, entertainment, etc (contents will come from TPB)
11. Philippines 360

### III. SCOPE OF SERVICES

**A. Manage the contents of the online platform to include all the components specified above.**

**B. Key tasks:**

1. Assist in inviting preferably DOT-accredited and TPB-member seller participants across the following sectors:
  - a. Transportation
  - b. Accommodation
  - c. Tour operators/travel agents
  - d. MICE operators
  - e. Health and wellness companies, ecotourism camps
  - f. Attractions and recreation facilities/operators (adventure sports)
  - g. Others

Note: TPB shall handle invitations for major hotels and tour operators. EMC shall assist in inviting DOT-accredited/TPB-member seller participants from other sector members.

2. Conduct all polls during webinars, stakeholder surveys, including analysis and interpretation of data.
3. Handle the orientation to sellers, buyers, and organizers;
4. Offer suggestions to improve the online platform;
5. Provide recommendations to improve future online events; and
6. Other similar event management tasks

**C. Webinars, Interviews, Roundtable discussions, and Surveys**

1. Conceptualize, implement, and manage at least five (5) webinars, two (2) roundtable discussions, and four (4) interviews. Recorded proceedings, canned materials, and/or content for live presentations should be submitted to TPB one (1) month before the event as may be feasible.

Topics for discussion may include, but not limited to:

Webinars	▪ Effective marketing strategies during crises
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	<ul style="list-style-type: none"> <li>▪ Embracing the power of technology</li> <li>▪ Green Destinations</li> <li>▪ Principles in developing sustainable community-based tourism</li> <li>▪ Delivering targeted messaging</li> </ul>
Roundtable discussions	<ul style="list-style-type: none"> <li>▪ Resilience and innovation – sharing motivational stories and techniques in overcoming hardships</li> <li>▪ Developing Crisis Leadership: Strategy, Productivity, and Work Methods</li> <li>▪ Welcome Back to the Philippines</li> <li>▪ “Voluntourism”</li> </ul>

2. Conduct interviews of key tourism players for current updates on their strategies and action plans as may be feasible:
  - a. President Rodrigo Roa Duterte (inspirational message)
  - b. Atty. Anthonette Velasco-Allones, TPB COO
  - c. Sec. Berna Romulo Puyat, DOT
  - d. Cong. Garin and Cong. Aragon, House Committee on Tourism
  - e. CEOs/Presidents/Chairmen of airlines
  - f. Mr. Art Lopez, PHOA
  - g. Mr. Jojo Clemente, Tourism Congress of the Philippines
  - h. Mr. Cesar Cruz, Philippine Tour Operators Association

\*Any replacement is subject to TPB’s approval.
3. Administer polls and surveys
  - a. Create polls during webinars, discussions, and speeches
  - b. Devise the questionnaires (to be approved by the TPB) to gather and analyze data from all registrants that will assist TPB in crafting strategic marketing programs;
  - c. Process gathered information.
4. Submit a planned topic outline for approval of the PHITEX Organizers; and
5. Invite Speakers on the approved topics

**D. TRAVEL EXCHANGE SESSION (BUSINESS-TO-BUSINESS SESSION)**

1. Conceptualize, implement and manage the event plan/program for the PHITEX TRAVEX B2B on 23-24 September 2020;
2. Provide a program flow/detailed scenario/script based on the approved program;
3. Provide, install and manage the technical requirements for the virtual PHITEX Travel Exchange per agreement.
4. Oversee, coordinate and present a final dry-run of the program before the event for final approval of TPB;

5. Develop and produce a TRAVEX AVP Briefing/infographic of the core guidelines for B2B participation and programme of activities.
6. Produce a timer for appointments (20 minutes per meeting session) with a cue to indicate the start and the end.

**Proposed schedule of activities (tentative program):**

<b>22 September 2020</b>		
TIME	ACTIVITY	REMARKS
9:00 am	Marketing Workshop for Sellers	<b>*** Tentative program flow</b>
2:00 pm	Final dry run, Tech Check	
<b>23 September 2020</b>		
TIME	ACTIVITY	REMARKS
9:00 am	Opening Program	<b>*** Tentative program flow</b>
9:30 am onwards	B2B pre-arranged meetings Roundtable Discussions Webinars Interviews Speed Networking Games	
10:00 pm	Last B2B session	
<b>23 September 2020</b>		
TIME	ACTIVITY	REMARKS
8:30 onwards	Continuation of activities	<b>*** Tentative program flow</b>
7:00 pm	Closing Program	

**SELLERS KITS AND GIVE-AWAYS (EMC should send by courier to all seller participants before the event)**

1. 150 pieces of seller kits (conference bags)
2. 150 pieces of high-quality headsets for sellers
3. 150 pieces of appointment diaries
4. 150 pieces of giveaways/souvenirs

Note: All materials should preferably be sustainable or eco-friendly, with TPB and It's More Fun in the Philippines logo

#### **IV. TECHNICAL REQUIREMENTS**

1. Bidder must be in operation for at least ten (10) years, handling local and international events of similar nature;
2. Bidder must be Filipino owned, operated and legally registered Events Management Company / Production House / Conference Integrator under Philippine laws;
3. Bidder must have key personnel (i.e. Event Manager, Event Director, Creative Director, Event Officers) who all have a minimum of ten (10) years of experience in organizing MICE and/or B2B events;
4. Bidder must submit a list of MICE and/or B2B events handled in the last five (5) years;
5. Bidder must submit evidence of membership in an international association for Tourism and/or MICE;
6. Bidder must be a DOT-accredited establishment;
7. Company profile

#### **V. ADDITIONAL REQUIREMENTS**

To ensure delivery of the tasks assigned, the EMC shall provide a team as human resource complement composed of the following:

1. Event Director - 1
2. Event Manager - 1
3. Event Officers - 3 (to manage the webinars, discussions, and other components of the virtual event)
4. Creative Director - 1
5. Writer - 1 (for scripts, press releases, etc)
6. Technical support team - 4
7. Messenger - 1
8. Administrative support - 1
9. Secretariat support

Bidders will be required to make a presentation (maximum of 15 minutes) of their Plan Approach. The winning bid must attain a hurdle rate of 85% based on the following set of selection criteria with their corresponding weight assignment:

#### **VI. CRITERIA FOR EVALUATION**

<b>Proposal</b>	<b>Weight</b>
Technical Proposal	85%
Financial Proposal	15%

**RATING CRITERIA FOR EVENTS MANAGEMENT COMPANY FOR PHITEX**

**A. Eligibility Check and Shortlisting Criteria and Rating (80% passing score)**

Evaluation Criteria	Rating	
<b>I. Applicable Experience of the Bidder</b>		<b>70%</b>
A. Years active in the field (30%)	30%	
10 years and above of handling both local and international events (30%)		
6-9 years of handling both local and international events (20%)		
0-5 years of handling both local and international events (15%)		
B. Affiliation to International Association for Tourism or MICE (20%)	20%	
Affiliated with 2 or more related association (20%)		
Affiliated with 1 related association (10%)		
C. Provided list of handled similar projects within the last ten (10) years, minimum of five (5) MICE/B2B-related projects with at least one government project, with local and international participants.	20%	
Five (5) and above MICE/B2B-related project within the last 5 years with at least three (3) Philippine government projects (20%)		
Below 5 MICE/B2B-related project within the last 5 years with at least three (3) Philippine government projects (10%)		

<b>II. Years of Experience of Personnel Who Will Be Assigned To The Project</b>		<b>20%</b>
<p>Required experience of key personnel in organizing MICE, B2B events</p> <ul style="list-style-type: none"> <li>· Event Director (1)</li> <li>· Event Manager (1)</li> <li>· Creative Director</li> <li>· Event Officer (3 personnel)</li> </ul> <p>Majority of personnel have 10 years or more experience – 15%</p> <p>Majority of personnel have 5 to less than 10 years of experience – 10%</p>	15%	
<p>Required experience of support personnel in organizing similar events</p> <ul style="list-style-type: none"> <li>· Writer (1)</li> <li>· Technical Support Team (4 personnel)</li> </ul> <p>Majority of personnel have five (5) years or more experience – 5%</p> <p>Majority of personnel have less than five (5) years of experience – 3%</p>	5%	
<b>III. Current Workload Relative to Capacity</b>		<b>10%</b>
Number of ongoing projects/accounts as of 2020 being handled of similar scope and nature		
Below 5 projects (10%)		
5 and above projects (5%)		
<b>TOTAL</b>		<b>100%</b>

**B. Technical Bid/Proposal Criteria and Rating (80% passing score)**

CRITERIA	RATING	
<b>I. Quality of Personnel who may be Assigned to the Project</b>		<b>20%</b>
<p>Required qualifications and experience of the following key personnel in organizing similar projects:</p> <ul style="list-style-type: none"> <li>· Event Director (1)</li> <li>· Event Manager (1)</li> <li>· Creative Director</li> <li>· Event Officer (3 personnel)</li> <li>· Writer (1)</li> <li>· Technical Support Team (4 personnel)</li> </ul> <p><i>Covering the suitability of the key staff to perform the duties of the particular assignments and general qualifications and competence including education and training of the key staff and similar projects handled by personnel (based on submitted CVs)</i></p>		
<b>II. Firm Experience and Capability</b>		<b>20%</b>
<p>Experience of the firm in handling similar nature of work (10%)</p> <p><i>Consultant has presented evidence in organizing virtual events and exhibitions using various platforms and other technology tools. Webinars, virtual meetings, administered polls and surveys from previous live and online events presented meet the standards required for PHITEX.</i></p>		
<p>Database of the Consultant (10%)</p> <p><i>Existing database of the consultant is extensive and includes DOT-Accredited companies from the identified seller sectors and potential speakers for the topics mentioned in this bid.</i></p>		

<b>II. Plan Approach and Methodology</b>		<b>60%</b>
a. Adherence of the proposal to all the required components of PHITEX 2020 as mentioned in this bid (15%)		
b. Creativity and innovativeness of the plan of approach (20%)		
c. Relevance of the concept and proposed topics to the PHITEX theme (15%)		
d. Feasibility of the planned executive of the overall scope of work (10%)		
<b>TOTAL</b>		<b>100%</b>

### Rating guide for Technical Proposal

	<b>CRITERIA</b>	<b>WEIGHT</b>
<b>I.</b>	<b>Firm Experience And Capability</b>	<b>30%</b>
	a. Must have a minimum of 3-year experience in organizing local and international large-scale MICE, B2B and other tourism events with at least 500 participants (10 points) b. Expertise in the field and technical resources support to implement the project (10 points) c. Must be financially capable of advancing all payment necessary to implement the project (10 points)	
<b>II.</b>	<b>PLAN OF APPROACH AND METHODOLOGY</b>	<b>70%</b>
	a. Content and functionality of the virtual platform (30 points) b. Relevance of the concept to the PHITEX theme (10 points) c. Creativity of the virtual platform's design (30 points)	
	<b>TOTAL</b>	<b>100%</b>

## V. BUDGET

The Approved Budget for the Contract is **NINE MILLION NINE HUNDRED TEN THOUSAND PESOS (PHP 9,910,000.00)** inclusive of all applicable taxes. The cost of items in the bid should be broken down as follows:

1. Professional fees and tokens for webinar speakers, discussants, interviewees, moderators, etc.
2. Gifts and tokens to sellers, buyers, VIPs, and other guests, subject to the approval of TPB
3. Physical venue, production of opening/closing programs, set-up, and accommodation
4. Other event-related expenses
5. Management fees
6. Taxes

### Annex B: Budget Breakdown

The winning bid shall be determined **based on the quality of the proposal with the most advantageous financial package cost**, provided that the amount of bid does not exceed the above mentioned approved budget. The deadline for submission of bids should be at the time and place indicated in the bid documents/invitation to bid.

## VI. TERMS OF PAYMENT

Amount	Deliverables
35% (1 <sup>st</sup> progress payment)	<ul style="list-style-type: none"><li>- Upon submission and presentation of a detailed program concept</li><li>- approved Knowledge Management topics</li><li>- approved speakers</li><li>- approved opening and closing program</li><li>- approved list of invitees</li></ul>
25% (2 <sup>nd</sup> progress payment)	<ul style="list-style-type: none"><li>- Upon submission and approval of program script, flow, and set-up requirements</li><li>- at least 50% of the invited participants have successfully registered</li><li>- delivered giveaways to registered participants</li></ul>
25% (3 <sup>rd</sup> progress payment)	<ul style="list-style-type: none"><li>- Upon presentation of final dry run/tech check</li></ul>
15% (4 <sup>th</sup> progress payment)	<ul style="list-style-type: none"><li>- Upon completion and satisfactory performance of services and submission of deliverables such as end reports, videos, pictures.</li></ul>

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