

**TERMS OF REFERENCE  
ONLINE TRAINING ON RESEARCH AND ANALYSIS  
9-10 NOVEMBER 2020**

**I. RATIONALE**

As part of its Learning and Development Program, the Tourism Promotions Board (TPB) desires to conduct a virtual workshop as follows:

- Learning Program : Online Training on Research and Analysis
- Schedule : 9-10 November 2020  
With at least 4 hours of virtual learning sessions per day
- No. of Participants : 40 pax
- Platform : Zoom

**II. OBJECTIVES**

- Expand the participant's ability to collect information through various research methodologies
- Examine or appraise collected data and information in order to understand its nature, significance, and relevance to the successful implementation of a plan, program or activity

**III. SCOPE OF DELIVERABLES**

TPB is in need of the services of a training and learning intervention provider to conduct an Online Training on Research and Analysis on 09-10 November 2020 for at least 4 hours of virtual learning session per day.

- **In-Session:**
  1. Administer pre-test and post-tests within the learning sessions;
  2. Conduct and facilitate the Online Training on Research and Analysis;
  3. Zoom moderator and program management committee
- **Post-session:**
  1. Provide evaluation instrument to be used by supervisors to measure the effectiveness of the training and improvement of the participant's in communication writing
  2. Provision of certificates, post-program/terminal reports, and raw and edited file recordings of the whole learning session

**III. QUALIFICATIONS OF BIDDER:**

- A. Bidder must have been in operation for at least three (3) years.
- B. Bidder must have been involved in providing training and learning interventions in government and private offices for at least three (3) years.
- C. Bidder must have conducted more than 20 virtual planning and execution workshop using Zoom platform.
- D. Bidder must be able to offer customized content and programs that are tailor-fit to TPB's needs and objectives (not generic, one-size-fits-all materials)
- E. Bidder must be able to provide qualified subject matter experts based on the stated specifications.
- F. Bidder must have a licensed zoom account to host the entire virtual training.

- G. Bidder must be able to provide a moderator and program management committee that will take care of the virtual training using zoom technology.
- H. Bidder must provide list of key persons involved with respective work assignments during the preparation and actual research and analysis training such as project management team and moderators and the like, with their curriculum vitae.
- I. Bidder must be able to make a presentation of their plan and approach (maximum of 15 minutes).

**IV. ELIGIBILITY REQUIREMENTS**

A. Standard requirements:

- 1. Must be registered in the Philippine Government Electronic Procurement System (PHILGEPS);
- 2. Company Profile and Technical Proposal
- 3. Valid Mayor’s permit / Business Permit
- 4. Income / Business Tax Return
- 5. Omnibus Sworn Statement
- 6. DTI/SEC certification

B. Technical requirements:

- 1. List of learning sessions for the past 3 years in the private and government offices with a brief description and amount of contract. Identify whether face to face or virtual.
- 2. For government offices, must submit at least one of the following: Notice of Award (NOA), Purchase Order (P.O.), Event Contract, and/or Notice to Proceed (NTP);
- 3. Proof of licensed zoom account that will host the entire virtual training.
- 4. List with curriculum vitae of personnel involved with respective work assignments during preparation and actual learning sessions such as but not limited to project management team and moderators
- 5. List of qualified subject matter experts with their respective Curriculum Vitae based on the stated topic;
- 6. Course outline of customized proposal tailor-fit to TPB’s needs and objectives—
- 7. Statement of acceptability of the schedule of the abovementioned Scope of Deliverables.

**V. CRITERIA FOR EVALUATION**

Proposal	Weight
Technical Proposal	85%
Financial Proposal	15%

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

### RATING SHEET

CRITERIA		Score	Rating
<b>I.</b>	<b>Qualification of Subject Matter Expert who will be assigned to the Project</b>	<b>20 points</b>	
	<p>Required qualifications and experience of the key personnel in conducting customized online training on research and analysis.</p> <p>Key personnel involved with respective work assignments during preparation and actual research and analysis training such as Subject Matter Expert, project management team and moderators and the like.</p> <p>Covering the suitability of the key staff to perform the duties of the particular assignments and general qualifications and competence including list of qualified subject matter experts, education and training of the key staff and similar projects handled by personnel (based on submitted CVs)</p> <ul style="list-style-type: none"> <li>➤ Key personnel involved in the project must have:</li> <li>➤ 3 or more years of relevant experience (20%)</li> <li>➤ Less than 3 years of relevant experience (10%)</li> <li>➤ No relevant experience (0%)</li> </ul>		
<b>II.</b>	<b>Firm Experience and Capability</b>	<b>40 points</b>	
	<p>1 Has been involved in providing training and learning interventions in government and private offices:</p> <ul style="list-style-type: none"> <li>➤ 3 or more years (20%)</li> <li>➤ 2 or less than 3 years (10%)</li> <li>➤ Less than 2 years (5%)</li> </ul> <p>2 Conducted virtual learning sessions using zoom platform:</p> <ul style="list-style-type: none"> <li>➤ 20 or more sessions (20%)</li> <li>➤ Above 10 but less than 20 sessions (10%)</li> <li>➤ At least 10 sessions (5%)</li> <li>➤ Less than 10 sessions (0%)</li> </ul>		
<b>III.</b>	<b>Plan of Approach and Methodology</b>	<b>40 points</b>	
	<p>The functionality of the presented customized proposal tailor-fit to the TPB's needs and objectives – not generic, one-size-fits-all materials including:</p> <ul style="list-style-type: none"> <li>➤ Bidder's proposal of the course outline; new strategies/ideas/activities during the actual virtual learning session (15%)</li> <li>➤ Relevance of the customized topics to the organization's needs and objectives (20%)</li> <li>➤ Proof of licensed zoom account that will host the entire online training (5%)</li> </ul>		
<b>TOTAL</b>		<b>100 points</b>	

## **VI. Approved Budget for the Contract (ABC)**

The Approved Budget for the Contract is **ONE HUNDRED TWENTY THOUSAND PESOS (Php 120,000.00)** inclusive of all applicable fees and taxes. 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 a time and place specified in the request for quotation (RFQ).

## **VII. Terms of Payment**

Payment within 30 days upon full completion of the services and submission of the invoice.