

**TERMS OF REFERENCE
VIRTUAL PLANNING AND EXECUTION WORKSHOP
29-30 SEPTEMBER 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 : Virtual Planning and Execution Workshop
- Schedule : 19-20 October 2020
With at least 4 hours of virtual learning sessions per day
- No. of Participants : 40 pax
- Platform : Zoom

II. OBJECTIVES

- Define strategic event and project management planning
- Define steps in strategic event management, planning and executing
- Identify gaps in the process of planning and execution
- State the vision, mission and values of planning events
- Design a project and identify risks
- Prepare and present a mock project plan

III. SCOPE OF DELIVERABLES

TPB is in need of the services of a training and learning intervention provider to conduct a Virtual Planning and Execution Workshop on 29-30 September 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 Virtual Planning and Execution Workshop;
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

IV. 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 preparation and actual learning session 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).

V. ELIGIBILITY REQUIREMENTS

A. Standard requirements:

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

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

RATING SHEET

CRITERIA		Score	Rating
I.	Qualification of Subject Matter Expert who will be assigned to the Project	20 points	
	<p>Required qualifications and experience of the key personnel in conducting customized planning and execution workshop.</p> <p>Key personnel involved with respective work assignments during preparation and actual learning session 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> <p>Key personnel involved in the project must have:</p> <ul style="list-style-type: none"> ➤ Above 5 years of relevant experience (20%) ➤ 3 or more years of relevant experience (20%) ➤ Less than 3 years of relevant experience (10%) ➤ No relevant experience (0%) 		
II.	Firm Experience and Capability	40 points	
	<p>1 Has been involved in providing training and learning interventions in government and private offices:</p> <ul style="list-style-type: none"> ➤ Three (3) or more years (20%) ➤ Two (2) but less than three (3) years (10%) ➤ Less than two (2) years (5%) <p>2 Conducted virtual learning sessions using zoom platform:</p> <ul style="list-style-type: none"> ➤ 20 or more sessions (20%) ➤ Above ten (10) but less than 20 sessions (10%) ➤ At least ten (10) sessions (5%) ➤ Less than ten (10) sessions (0%) 		
III.	Plan of Approach and Methodology	40 points	
	<p>1. Functionality of the presented customized proposal tailor-fit</p>		

	<p>to TPB's needs and objectives – not generic, one-size-fits-all material including:</p> <ul style="list-style-type: none"> ➤ Bidder's proposal of the course outline; new strategies/ideas/activities during the actual virtual learning session (15%) ➤ Quality of the proposed subject matter experts based on the CV submitted (20%) ➤ Relavance of the customized topics to the TPB's needs and objectives (5%) 		
	TOTAL		100 points

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.