

## **TERMS OF REFERENCE**

### **Engagement of Consultancy Services for the maintenance and improvement of the Tourism Promotions Board ISO 9001:2015 Quality Management System**

#### **I. PROJECT**

The Tourism Promotions Board (TPB) is seeking for a competent and experienced ISO Consultant or Consulting Firm who can provide technical services for the maintenance and improvement of TPB's ISO 9001:2015 Quality Management System (QMS).

#### **II. BACKGROUND**

The TPB, a certified ISO 9001:2015 compliant agency has successfully passed the Re-Certification Audit conducted last 21 October 2021.

This was the seventh consistent recognition of TPB's commitment to institutionalize its Quality Management System (QMS) with a scope of service covering the design, development and provision of Philippine tourism marketing and promotion.

To ensure the continual compliance of TPB's QMS, TPB endeavors to further improve the application and implementation of the established QMS in the different respective areas to achieve an efficient and effective long-term maintenance.

#### **III. OBJECTIVES**

To provide technical assistance and guidance to TPB officers, key personnel and staff for better understanding, improved application and implementation of:

1. ISO 9001:2015 QMS established in the respective areas of duties, responsibilities and authorities for more effective and efficient long-term maintenance of TPB's Quality Management System;
2. Corrective Action Process as a management system tool to conduct root cause analysis, formulate appropriate correction and corrective action to address external and internal audit findings and to improve TPB's Quality Management System process performance;
3. Organizational and process-level risk identification, evaluation and control to help achieve TPB's organizational goals and objectives; and
4. Review and update of relevant systems and operating procedures, forms and other monitoring and measurement tools to ensure adequacy, suitability and responsiveness to the current needs of TPB.

#### **IV. SCOPE OF SERVICES**

The said consulting services shall involve the following activities:

1. Adherence to the appointment - mutually agreed training and consulting days;
2. Provision of electronic copies of the training material prior to the scheduled training;
3. Compliance with training and consulting requirements for the entire approved undertakings;
4. Conduct workshops for better understanding of the participants; and
5. Training and workshops to be conducted online.

## **V. CONSULTANT OR CONSULTING FIRM'S QUALIFICATION REQUIREMENTS**

### Qualification of the Firm

1. Must be in the industry for the last five (5) years, handling consulting project in the establishment/ documentation up to certification of an ISO 9001 QMS;
2. Must have undertaken at least five (5) successful consultancy project services with government organizations in the establishment of QMS towards the achievement of certification to ISO 9001:2015 Standard
  - a. Submit Article of Incorporation, DTI, CDI, registration certificate, whichever is applicable
  - b. Submit list of ongoing and completed government and private contract for the last five (5) years whether similar or not similar in nature to the project. The format shall include the name of the agency, title of the project amount of the contract.
  - c. Submit copy of Notice to Proceed, Contract, Certificate of Project Completion, or whichever is applicable);

### Qualification of the Consultant

1. Must possess at least five (5) years of consulting experience in the establishment/documentation up to certification of an ISO 9001 QMS.
2. Must have undertaken at least five (5) successful consultancy services with government organizations in the establishment of QMS towards the achievement of certification to ISO 9001:2015 Standard (provide copy of Notice to Proceed, Contract, Certificate of Project Completion, or whichever is applicable);
3. Must be an approved Third Party Auditor by a certifying body in auditing ISO 9001:2015 QMS;
4. Must have conducted Public trainings for ISO 9001:2015 QMS with a recognized government training institution.
  - a. Submit Certificate as ISO Trainer/Auditor
  - b. Submit CV using the TPF6 Form
  - c. Submit copy of Notice to Proceed, Contract, Certificate of Project Completion, or whichever is applicable

## Key Personnel

Minimum of one (1) Auditor to assist in the pre-surveillance audit. Must have at least three (3) years of relevant work experience.

- a) Submit Certificate as ISO Auditor
- b) Submit CV using the TPF6 Form

## VI. SCHEDULE OF DELIVERABLES:

Activity	No. of Days	Proposed Schedule
<b>A. MILESTONE ON ISO 9001:2015 QMS AWARENESS AND REFRESHER TRAINING</b>		
<b>ISO 9001:2015 QMS Awareness</b> (designed for new personnel and process owners)	<b>1 day</b>	25 March
<b>B. MILESTONE ON INTERNAL QUALITY AUDITING</b>		
<b>Effective Internal Auditing ISO 9001:2015 QMS Based on ISO 19011:2018 Training and Workshop</b> (designed for new IQAs and serves as a Refresher Course for existing IQAs )	<b>2 days</b>	21 – 22 March
<b>Calibration on Understanding the ISO 9001:2015 Requirements as Audit Criteria in the Conduct of of Internal Quality Audit</b> (designed for new IQAs and serves as a Refresher Course for existing IQAs )	<b>2 days</b>	11-12 April
<b>Calibration of Internal Quality Auditors on Technical Writing of IQA Findings and Preparation of IQA Reports</b> (designed for new and existing IQAs)	<b>1 day</b>	28 April
<b>C. MILESTONE ON RETOOLING ON DOCUMENT CONTROL</b>		
<b>Calibration of Document Controllers - 30 pax</b> (designed for Corporate Document Control Officer and Deputy Document Controllers)	<b>1 day</b>	29 April
<b>D. FOCUS GROUP DISCUSSION AND CONSULTING (25 days)</b>		
<b>Focus Group Discussion on the Technical Review and Update of TPB's System Procedures (SPMs), Forms, Allowed Permanent Process Changes and Opportunity/Risk Rating Schemes</b>  (designed for concerned Departmental Managers, Division Chiefs and Key Process Owners)	<b>2 days</b>	04 & 09 May
<b>Focus Group Discussion on the Technical Review and Update of Relevant Quality Operating Procedures (QOPs), Forms and Allowed Permanent Process Changes – Per Department (IPD, DPD, MICE, MarCom, CPBD,</b>	<b>5 days</b>	10, 11, 16, 17 & 18 May

<p><i>FinD, LegD, AdminD, OCOO, DCOO)</i></p> <p><i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i></p>		
<p><b>Focus Group Discussion on the Technical Review and Update of Functional Quality Objectives and Targets (FQOTs), Monitoring Log Sheets and Quality Objectives Monitoring and Evaluation Tools – Per Department (IPD, DPD, MICE, MarCom, CPBD, FinD, LegD, AdminD, OCOO, DCOO)</b></p> <p><i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i></p>	<b>4 days</b>	02, 07, 09, & 10 June
<p><b>Focus Group Discussion revisiting and re-establishing TPB’s context considering the internal and external issues affecting the achievement of organizational goals and objectives, including the requirements, needs and expectations of relevant interested parties vis-a-vis in-depth and broad identification of risks – (ManCom, ExeCom)</b></p> <p><i>(designed for the COO, DCOOs, Departmental Managers, and Division Chiefs)</i></p>	<b>1 day</b>	20 June
<p><b>Focus Group Discussion on the Technical Determination, Evaluation and Control of Organizational and Process-Level Opportunities and Risks Using the Prescribed Relevant Forms – (IPD, DPD, MICE, MarCom, CPBD, FinD, LegD, AdminD, OCOO, DCOO)</b></p> <p><i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i></p>	<b>5 days</b>	04, 07, 11, 12 & 14 July
<p><b>Focus Group Discussion on the Technical Conduct of Root Cause Analysis, Formulation of Corrections and Corrective Actions, and Appropriate Use of the Corrective Action Request Forms – Per Department – Per Department (IPD, DPD, MICE, MarCom, CPBD, FinD, LegD, AdminD, OCOO, DCOO)</b></p> <p><i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i></p>	<b>4 days</b>	08, 09, 11 & 18 August
<p><b>Focus Group Discussion on the Technical Review and Preparation of Project Procurement Management Plans (PPMPs) Vis-</b></p>	<b>2 days</b>	25-26 August

<b>à-vis FQOTs</b> <i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i>		
<b>Focus Group Discussion on the External Audit Findings</b> <i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i>	<b>2 days</b>	20-21 October
<b>E. MILESTONE ON PRE-SURVEILLANCE AUDIT</b>		
<b>Pre-Surveillance Audit</b>	<b>10 man-days</b>	01, 08, 09, 12 & 13 Sept

(Note: Proposed schedule and the number of days allotted per Focus Group Discussion may be adjusted subject to the recommendations of the Consultant/Consulting Firm and the approval of the TPB.)

#### VII. DURATION OF ENGAGEMENT

The engagement of the ISO 9001:2015 QMS Consultant / Consulting Firm will start from the date of acceptance of the Notice to Proceed (NTP) until all deliverables have been complied with but should not exceed 31 December 2022.

#### VIII. APPROVED BUDGET FOR THE CONTRACT (ABC)

Php998,000.00 (inclusive of all applicable taxes)

#### IX. TERMS OF PAYMENT

<b>Payment</b>	<b>Deliverables</b>
<b>A. MILESTONE ON ISO 9001:2015 QMS AWARENESS AND REFRESHER TRAINING</b>	
<b>4% of the ABC</b>	<b>Upon conduct of ISO 9001:2015 Awareness</b>
<b>B. MILESTONE ON INTERNAL QUALITY AUDITING</b>	
<b>22% of the ABC</b>	<b>Upon conduct of training and workshop on:</b> <ol style="list-style-type: none"> <li><b>1. Effective Internal Auditing ISO 9001:2015 QMS Based on ISO 19011:2018 Training and Workshop</b></li> <li><b>2. Calibration on Understanding the ISO 9001:2015 Requirements as Audit Criteria in the Conduct of Internal Quality Audit</b></li> <li><b>3. Calibration of Internal Quality Auditors on Technical Writing of IQA Findings and Preparation of IQA Reports</b></li> </ol>

<b>C. MILESTONE ON RETOOLING ON DOCUMENT CONTROL</b>	
4% of the ABC	Upon conduct of Calibration of Document Controllers
<b>D. FOCUS GROUP DISCUSSION AND CONSULTING</b>	
50% of the ABC	<p>Upon conduct of Focus Group Discussion and Consulting (25 days):</p> <ol style="list-style-type: none"> <li>1. Technical Review and Update of TPB's System Procedures (SPMs), Forms, Allowed Permanent Process Changes and Opportunity/Risk Rating Schemes</li> <li>2. Technical Review and Update of Relevant Quality Operating Procedures (QOPs), Forms and Allowed Permanent Process Changes – Per Department</li> <li>3. Focus Group Discussion on the Technical Review and Update of Functional Quality Objectives and Targets (FQOTs), Monitoring Log Sheets and Quality Objectives Monitoring and Evaluation Tools – Per Department</li> <li>4. Group Discussion on the Technical Review and Preparation of Project Procurement Management Plans (PPMPs) Vis-à-vis FQOTs</li> <li>5. Technical Determination, Evaluation and Control of Organizational and Process-Level Opportunities and Risks Using the Prescribed Relevant Forms</li> <li>6. Technical Conduct of Root Cause Analysis, Formulation of Corrections and Corrective Actions, and Appropriate Use of the Corrective Action Request Forms – Per Department</li> <li>7. Focus Group Discussion revisiting and re-establishing TPB's context considering the internal and external issues affecting the achievement of organizational goals and objectives, including the requirements, needs and expectations of relevant interested parties vis-a-vis in-depth and broad identification of risks – <i>ManCom, ExeCom</i></li> <li>8. Focus Group Discussion on the External Audit Findings</li> </ol>
<b>E. MILESTONE ON PRE-SURVEILLANCE AUDIT</b>	
20% of the ABC	Upon conduct of Pre-Surveillance Audit (10 man-days)

(Note: Proposed terms of payment may be adjusted subject to the financial proposal of the Consultant/Consulting Firm but the total amount should not exceed the ABC.)

## PROPOSALS

The Consultant / Consulting Firm is expected to submit technical and financial proposals which shall be evaluated based on Quality Cost Based Evaluation (QCBE). The winning bidder must attain a hurdle rate of 85% based on the following set of selection criteria with their corresponding weight assignments:

<b>Proposal</b>	<b>Weight (%)</b>
Technical	85
Financial	15
TOTAL	100

Bidders are required to present (maximum of 15 minutes) their plan approach for the project.

Based on section 33.2.2. of R.A. 9184, the technical proposal and presentation of the Consultant / Consulting Firm shall be evaluated based on the following criteria with corresponding numerical weights:

	<b>PARTICULARS</b>	<b>%</b>	<b>RATING</b>
<b>I.</b>	<b>Quality of Personnel to be assigned to the project:</b>		<b>40%</b>
	Profile and expertise of key personnel who will be assigned to the project, showing specialization in consulting, conducting ISO trainings / workshops and ISO Audits		
A.	Approved Third Party Auditor by a certifying body in auditing ISO 9001:2015 QMS (10%) <ul style="list-style-type: none"> <li>• Certified ISO Auditor for more than 5 years (10%)</li> <li>• Certified ISO Auditor for at least 5 years (8%)</li> <li>• Certified ISO Auditor for less than 5 years (0%)</li> </ul>	10%	
B.	Conducted Public trainings for ISO 9001:2015 QMS with a recognized government training institution (10%) <ul style="list-style-type: none"> <li>• Conducted Public trainings for more than 5 years (10%)</li> <li>• Conducted Public trainings for at least 5 years (8%)</li> <li>• Conducted Public trainings for less than 5 years (0%)</li> </ul>	10%	
C.	At least one (1) Auditor to assist in the Pre-surveillance audit (10%) <ul style="list-style-type: none"> <li>• More than 1 Auditor (10%)</li> <li>• At least 1 Auditor (8%)</li> </ul>	10%	
D.	Relevant Work Experience of the Assistant Auditor	10%	
	With more than 3 years of relevant work experience (10%)		
	With at least 3 years of relevant work experience (8%)		
	With less than 3 years of relevant work experience (0%)		
<b>II.</b>	<b>Experience and Capability of the Consultant / Consulting firm:</b>		<b>30%</b>
A.	Consulting experience in the establishment / documentation up to certification of ISO 9001 QMS	10%	
	With more than 5 years consulting experience (10%)		
	With at least 5 years consulting experience (8%)		
	Less than 5 years consulting experience (0)		
B.	Successful consultancy services with government organizations in the establishment of QMS towards the achievement of certification to ISO 9001:2015 version	10%	
	With more than 5 government agencies (10%)		



	<b>PARTICULARS</b>		<b>%</b>	<b>RATING</b>
		With at least 5 more government agencies (8%)		
		Less than 5 government agencies (0%)		
	C.	Conducted ISO 9001:2015 QMS Trainings	10%	
		With more than 5 trainings to government clients (10%)		
		With at least 5 trainings but no government client (8%)		
		Less than 5 trainings (regardless if there is a government client or none) (0%)		
<b>III.</b>	<b>Plan of Approach and Methodology</b>			<b>30%</b>
	A.	Consistency of the proposed workplans with the Scope of Work <ul style="list-style-type: none"> <li>• Compliance to the scope of deliverables (20%)</li> <li>• Non-compliance to the scope of deliverables (0%)</li> </ul>	20%	
	B.	Project plan approach to achieve the deliverables/ expected outputs within the specified timeframes. <ul style="list-style-type: none"> <li>• The proposed plan approach and methodology is align with the project objectives (10%)</li> <li>• The proposed plan approach and methodology is not align with the project objectives (0%)</li> </ul>	10%	
	<b>TOTAL</b>			<b>100%</b>