

ANNEX A: TERMS OF REFERENCE

SERVICE PROVIDER TO DESIGN AND IMPLEMENT THE TOURISM MARKETING EDUCATIONAL SEMINAR

Run 1: April 17-22, 2023 | Ilocos Region

Run 2: May 15-20, 2023 | Bohol
(indicative dates)

I. BACKGROUND

One of the Tourism Promotions Board (TPB) - Domestic Promotions Department's (DPD) commitments is the conduct of a tourism marketing educational seminar. A seminar that provides up-to-date information and an enhanced understanding of tourism trends, best practices, new marketing approaches to increase the marketability of tourism destinations while promoting sustainable and responsible tourism, and to achieve global competitiveness and promote travel excellence.

Target participants are tourism and marketing officers from the Local Government Units (LGUs) and the Department of Tourism Regional Offices (DOT ROs) nationwide. The confirmed participants will attend one (1) run equivalent to a 3-day session or 24 learning hours.

There will be one (1) over-all topic for the two (2) runs which is **“Understanding Tourism Marketing and Promotions for New LGU Tourism Officers”**. The topic will be expanded to highlight their skills and knowledge as it comes to marketing and promoting their destination's products and services.

II. OBJECTIVES

- a. To upgrade the skills and competency levels of the participants through understanding of new marketing approaches and techniques to increase marketability of their tourism destination.
- b. To achieve global competitiveness and promote travel excellence while practicing sustainable and responsible tourism.
- c. To capacitate and retool the participants on marketing methodology adapting to the new normal.
- d. To provide an intelligible and interactive seminar.

III. SCOPE OF SERVICES AND DELIVERABLES

Seminar Management

<p>Management / Professional Fee</p>	<ul style="list-style-type: none"> • Formulate a methodological framework of the determined topic • Provide the regions a tool for strategic planning and decision-making that identifies strengths to be harnessed and weaknesses to be addressed. • Provide a monitoring and evaluation method vis-a-vis program objectives. • Provide printed seminar/training materials for the participants (e.g. Powerpoint slide deck, activity/exercise sheets/workbook, course outline/guide/manual). • Preparatory work for the participants prior to the seminar proper may be requested. • Data analytics (registration total, demographics, attendee profile, attendee engagement, etc.) • Create and disseminate an e-reminder prior to the event proper and post-thank you e-mail to all participants.
<p>Module / Training Material Preparation</p>	<ul style="list-style-type: none"> • Design the module and implement the approved program/topic. • Identify appropriate pointers with the latest trends/information that will help upgrade the decision-making skills of the officers. • Provide adequate insights to support sustainable planning and tourism programs of the regions. May use community-based sustainable tourism programs as a case study.
<p>Speakers' Honorarium/ Professional Fees</p>	<ul style="list-style-type: none"> • Provide a minimum of three (3) local and/or foreign speakers, guests, or tourism experts appropriate for each run. The DPD may suggest preferred speakers. Final roster is subject to approval of TPB-DPD. • Speaker's Professional Fee (inclusive of tax): <u>Local speaker:</u> A maximum of thirty thousand pesos (PhP 30,000.00) per speaker per run

	<u>Foreign speaker:</u> A maximum of fifty thousand pesos (PhP 50,000.00) per speaker per run
Transfer of Speakers' Presentation to USB	<ul style="list-style-type: none"> • Store Speakers' presentation in USB (universal serial bus). USB will be provided for by TPB.
Other Inclusion	<ul style="list-style-type: none"> • A maximum of an 8-member team including the speakers, to join the actual implementation • Printing and dissemination of Certificates of Participation and Certificates of Attendance • Support staff allowances • Other transportation expenses • Training supplies • Other applicable fees

Additional Deliverables:

1. Turnover to TPB three (3) copies of the Course Module and Terminal Report (per run) including:
 - a. Executive Summary
 - b. Program
 - c. Expectations vs Output
 - d. Observations / Recommendation
 - e. Survey Result & Evaluation
 - f. List of Participants
2. Disseminate TPB post- evaluation forms and provide a summary of the feedback result.
3. Provide a co-signed Certificates of Participation and Attendance.

TPB to provide the following logistics requirements for the Service Provider:

Accommodation	Maximum of four (4) twin sharing rooms on a 5 days / 4 nights stay
Land Transportation	Airport-hotel-airport transfers
Meals	Full board (daily breakfast, AM snacks, lunch, PM snacks & dinner)
Airfare	Maximum of eight (8) roundtrip economy class air tickets per run Team (5 persons) Speakers (3 persons)

Note:

1. Airfare, transportation and meal expenses outside the above-mentioned are charged to own pax account.
2. For the Post-Tour with participants, a maximum of eight (8) participants from the Service Provider are allowed to join free of charge.

IV. PROJECT IMPLEMENTATION / SCHEDULE OF REQUIREMENTS

COMPONENT OF THE PROGRAM

a. Target Implementation Date (seminar proper)

Run 1	April 18-20, 2023
Run 2	May 16-18, 2023

b. Physical set-up : Classroom (onsite)

c. No. of Runs : Two (2); One (1) run in Ilocos and one (1) run in Bohol

d. Webinar Hours : Maximum of eight (8) hours a day
x 3 days or 24 hours per run

e. No. of Participants per Run : Sixty (60) onsite participants per run

e. Target Participants : Department of Tourism Regional Offices (DOT-RO) and Local Government Units (LGUs) tourism and marketing officers, from the sixteen (16) regions

f. Proposed Program (tentative) :

Day	Program/Activity
Day 1	<ul style="list-style-type: none">• Arrival / Check-in / Ingress at training venue• Seminar Briefing
Day 2	<ul style="list-style-type: none">• Introduction / National Anthem/ Invocation• Ground Rules• Plenary Session / Break-out Session• Synthesis and wrap-up
Day 3	<ul style="list-style-type: none">• Plenary Session / Break-out Session• Q & A

	<ul style="list-style-type: none"> • Synthesis and wrap-up
Day 4	<ul style="list-style-type: none"> • Plenary Session / Break-out Session • Q & A • Synthesis and wrap-up • Closing / Egress
Day 5	<ul style="list-style-type: none"> • Optional: Post-Tour
Day 6	<ul style="list-style-type: none"> • Departure / Check-out

Note: Break-out Sessions may be a workshop, group discussions, quiz test, individual or group presentation, role playing exercises, Kahoot! game, etc.

V. QUALIFICATION OF BIDDER

- a. Must be a Filipino owned, operated and legally registered company that handles educational training programs or is an educational training institution under the Philippine laws and must have been in operation for at least five (5) years.
- b. Bidder must have at least handled three (3) tourism-related projects/events for the last five (5) years.
- c. Bidder must have at least handled five (5) seminar, workshop and training sessions with events in the past three (3) years

VI. QUALIFICATION OF KEY PERSONNEL

Key personnel involved in the project must have a minimum of three (3) years of relevant experience supported by CVs:

- 1) Project Manager/Coordinator (1 personnel)
- 2) Facilitators (3 personnel)
- 3) Admin/Secretariat (1 personnel)

**Bidders may recommend additional personnel deemed fit for the team following the scope of work and deliverables*

VII. APPROVED BUDGET FOR THE CONTRACT (ABC)

The Approved Budget for the Contract is **TWO MILLION PESOS ONLY (PhP 2,000,000.00)**, inclusive of all applicable fees and taxes. The cost of items in the bid should be broken down.

VIII. TERMS OF PAYMENT

Payment for the service provider shall be based on the completion of each phase of the project as follows:

Tranches	Percentage of Payment
<p>Tranche 1:</p> <p>Upon submission of the design and training module based on chosen topic/s, Statement of Account, list of qualified and approved speakers.</p>	<p>15% of the total contract price</p>
<p>Tranche 2:</p> <p>Upon completion of Run 1 and the submission of the following:</p> <ol style="list-style-type: none"> 1. Statement of Account 2. Thee (3) copies of the approved Program 3. Three (3) copies of the course module and Terminal Report 4. One (1) sample copy per Certificate of Participation and Certificates of Attendance 5. Digital copy of the Speaker’s Presentation 6. Three (3) sets of Participant’s Kit/Manual 	<p>45% of the total contract price</p>
<p>Tranche 3:</p> <p>Upon completion of Run 2 and the submission of the following:</p> <ol style="list-style-type: none"> 1. Statement of Account 2. Thee (3) copies of the approved Program 3. Three (3) copies of the course module and Terminal Report 4. One (1) sample copy per Certificate of Participation and Certificates of Attendance 5. Digital copy of the Speaker’s Presentation 6. Three (3) sets of Participant’s Kit/Manual 	<p>40% of the total contract price</p>

IX. RATING GUIDE FOR TECHNICAL PROPOSAL

A. Eligibility Check and Shortlisting Criteria Rating (80% Passing Rate)

Evaluation Criteria	Rating	
I. Applicable Experience of the Bidder		50%
A. Years active handling educational training programs or as an educational training institution (20%)	20%	
<ul style="list-style-type: none"> • Five (5) years and above (20%) 		
<ul style="list-style-type: none"> • Below Five (5) years (0%) 		
B. Handled seminar, workshop and training sessions	20%	
<ul style="list-style-type: none"> • More than Five (5) related projects with at least 3 seminar, workshop or training sessions within the past three (3) years (20%) 		
<ul style="list-style-type: none"> • At least Five (5) related projects with at least 3 seminar, workshop or training sessions within the last three (3) years (15%) 		
<ul style="list-style-type: none"> • Below Five (5) related projects within the last three (3) years (0%) 		
C. Handled tourism-related projects/events	10%	
<ul style="list-style-type: none"> • Three (3) and above related projects within the last five (5) years (10%) 		
<ul style="list-style-type: none"> • Below three (3) related projects within the last five (5) years (0%) 		
II. Years of Experience of Personnel Who Will Be Assigned to The Project		30%
<p>Required minimum 3 years of experience of ALL key personnel in handling training event</p> <p>A. Project Manager/Coordinator (1 personnel)</p> <ul style="list-style-type: none"> • With three years or more of relevant experience (15%) • With less than three (3) years of relevant experience (0%) <p>B. Facilitators (3 personnel)</p> <ul style="list-style-type: none"> • With three years or more of relevant experience (10%) • With less than three (3) years of relevant experience (0%) <p>C. Secretariat (1 personnel)</p> <ul style="list-style-type: none"> • With three years or more of relevant experience (5%) 		

<ul style="list-style-type: none"> With less than three (3) years of relevant experience (0%) <p>Above three (3) years (all personnel) – 30%</p> <p>Less than 3 years (any personnel) – 0%</p>		
III. Current Workload Relative to Capacity		20%
Number of ongoing projects/accounts as of 2022 being handled of similar scope and nature		
Below 5 projects (20%)		
5 -10 projects (15%)		
Above 10 projects (0%)		
TOTAL		100%

B. Technical Bid/Proposal Criteria and Rating (80% Passing Rate)

CRITERIA	RATING	
I. Qualification of Personnel who may be Assigned to the Project		40%
Required qualifications and experience of key personnel assigned to the project: <i>Weight distribution:</i> <ul style="list-style-type: none"> Project Manager/Coordinator (20%) Facilitators (15%) Admin/Secretariat (5%) <i>Rating for each key personnel:</i> <ul style="list-style-type: none"> Four (4) or more years of relevant experience (perfect score) With three (3) years but less than four (4) years relevant experience (less 1% from the weight allotment) Less than three (3) year of relevant experience (0%) 		
II. Firm Experience and Capability		20%
Experience of the firm in handling similar nature of work		
<ul style="list-style-type: none"> More than 5 years (20%) At least 5 years (15%) Below 5 years (0%) 		
III. Plan Approach and Methodology		40%
a. Formulation of the methodological framework in relation to the specified topic (15%)		
b. Quality of the proposed speakers, resource persons, guest, and tourism experts (15%)		
c. Feasibility of the planned execution of the overall scope (10%)		
TOTAL		100%

Qualified Bidders will be required to make a presentation (maximum of 20 minutes) of their Plan Approach (the date of the presentation will be on short notice). The winning bid must attain a hurdle rate of 80% based on the following set of selection criteria with their corresponding weigh assignment:

Proposal	Weight
Technical	85%
Financial	15%
Total	100%

X. CONTRACT DURATION

To commence upon receipt of Notice to Proceed which should not be later than 7 calendar days after issuance until the completion of all deliverables.

XI. Contact persons:

1. Cesar R. Villanueva
Division Chief, Sales Division
cesar_villanueva@tpb.gov.ph
0928-504-3056

2. Rona Jean N. Olaivar
Market Specialist III
rona_olaivar@tpb.gov.ph
0917-924-7434

3. Abigail B. Francisco
Market Specialist II
abigail_francisco@tpb.gov.ph
0906-361-9470
