

STATEMENT OF COMPLIANCE TO THE TECHNICAL SPECIFICATIONS

REQUIREMENTS: SERVICE PROVIDER OF FACILITATOR AND COACHING (PR No. 4.049)

PROJECT NAME: TPB QUALITY MANAGEMENT SYSTEM PLANNING EVENTS FOR THE CY 2023 AND CY 2024

Quotation No. TPB-PR.2023.05.095

[Bidders must state here either “Comply” or “Not Comply” against each of the individual parameters of each Specification]

ITEM	SPECIFICATION	STATEMENT OF COMPLIANCE (COMPLY/ NOT COMPLY)
1	<p>Consultant Company Eligibility Requirements (Submit the following documents)</p> <p>a) PhilGEPS Registration Number</p> <p>b) Statement of all ONGOING AND COMPLETED government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, with the last FIVE (5) YEARS prior to the deadline for the submission and receipt of eligibility documents.</p> <p>c) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professional authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with their respective curriculum vitae</p> <p>d) Joint Venture Agreement (if applicable). In case the joint venture is already in existence, or duly notarized statement from all the potential joint venture partners in accordance with section 24.1(b) of the RIRR of RA 9184</p>	
2	<p>Consultant Company Technical Requirements (Submit the following documents)</p> <p>TPF 1. Signed Technical Proposal Submission Form</p> <p>TPF 2. Consultant’s References (A brief description of the organization and outline or recent experience of the consultant on the project of a similar and related nature)</p> <p>TPF 3. Comments and Suggestion of consultant on the Term of Reference, etc. (Comments, if any, on the TOR)</p>	

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	<p>TPF 4. Description of the Methodology and Work Plan for the Performing the project</p> <p>TPF 5. Team Composition and Task</p> <p>TPF 6. Format of Curriculum Vitae for proposed professional staff</p> <p>TPF 7. Time Schedule for the Professional Personnel, indicating the estimated duration in terms of person-months and proposed timing of each input for each nominated experts.</p> <p>TPF 8. Activity Work Schedule (Work Plan showing in graphical format the timing of activities)</p> <p>Notarized Revised Omnibus Sworn Statement</p>	
3	The Financial Proposal must be submitted using attached Format	
4	The Financial Proposal requires completion of six (6) forms, particularly, FPF1, FPF2, FPF3, FPF4, FPF5 and FPF6.	
5	FPF 1 – Financial Proposal Submission Form should form the covering letter of the Financial Proposal. Form FPF 2 – Summary of Costs. FPF 3 Breakdown of Price per Activity, FPF 4, Breakdown of Remuneration per Activity, FPF 5 – Reimbursable per Activity, and FPF 6 – Miscellaneous Expenses, relate to the cost of consulting services under two distinct categories, namely (a) Remuneration; and (b) Reimbursable Expenditure	
6	<p>OBJECTIVES</p> <p>The hiring of a QMS facilitator-coach shall enhance the competency and capacity of the TPB's Corporate Planning and Business Development Department in conducting strategic and corporate planning sessions, performance monitoring and reporting and evaluation of programs, projects and activities being implemented by the Corporation.</p> <p>The facilitator-coach shall also guide the CPBD Department in further strengthening its QMS Planning processes by establishing an effective performance monitoring and reporting system in preparation for a project to automate TPB's internal Performance Evaluation System (PES) and Strategic Performance Management System (SPMS) by CY 2024.</p> <p>The service provider shall be responsible for the effective implementation of planning sessions/workshop activities, including trainings and ensuring a harmonized approach to the agreed upon outputs and deliverables, indicated in this Terms of Reference.</p>	

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7	<p>SCOPE OF SERVICES</p> <p>The said consulting services shall involve the following activities:</p> <ol style="list-style-type: none"> 1. Provision of Subject Matter Expert/s and Key personnel for the facilitation of and coaching for the QMS Planning Sessions; 2. Familiarization with TPB and its existing programs, including review of organizational documents and meetings with key personnel; 3. Compliance with the training and consulting requirements for the entire approved undertakings including but not limited to managing the Program Flow and facilitation of all the identified QMS activities specified in this Terms of Reference; 4. Adherence to the appointments - mutually agreed consulting/planning/training days; 5. Facilitate the conduct of planning workshops, training, focus group discussions, and pocket meetings to complete the Scope of Services/Outputs and Deliverables specified in this Terms of Reference; 6. Provision of templates for any pre-work required and templates for use in “in-session” activities 7. Provision of electronic copies of all program/training material prior to each and all scheduled training with a post report per milestone ; and 8. Produce two (2) Engagement Terminal Reports, under Tranches 1 and 2 respectively, covering the proceedings of the workshops, outputs during the activities and meetings, with synthesis and final audit/gap analysis report and recommendations on how to sustain and implement the learnings gained or any immediate “next steps” 	
8	<p>CONSULTANT OR CONSULTING FIRM’S ADDITIONAL QUALIFICATION REQUIREMENTS</p> <p>Qualification of the Firm and/or the Consultant</p>	

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1. The Bidder must be a Filipino or a Filipino-owned and registered company in the Philippines engaged in the business of training facilitation or similar engagements for the last five (5) years;
2. The Bidder must have a minimum of three (3) years' experience in conducting and facilitating competency and QMS based planning workshops and interventions in the private and government sectors including ISO 9001:2015 consultancy work;
3. All key personnel to be assigned to the project shall have:
 - relevant work experience in conducting and facilitating planning workshops and interventions in the private and government sectors, and
 - extensive working knowledge on competency based Performance Management System, the GCG-prescribed Performance Scorecard; and shall have recently assisted a government agency in the establishment of its Corporate and Functional Quality Objectives and/or Annual Planning
 - The relevant work experience and extensive working knowledge shall be as follows:

Key Personnel	Minimum Years of
Lead Facilitator/s	five (5) years
Subject Matter Experts	three (3) years
Project Manager	three (3) years
Admin/Support Staff	three (3) years

4. Further, the Subject Matter Expert/s shall preferably has/have qualifications as follows:

Subject Matter	SME Qualification
Performance Management	Certified Performance Management Professional
Risk Management	Established familiarity with ISO 31000 Risk Management Guidelines

If the Consultant is working as a single entity, then he/she must have accumulated the combined minimum work experience required of the lead and key personnel.

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SCOPE OF SERVICES/OUTPUTS AND DELIVERABLES WITH INDICATIVE SCHEDULE:		
Activity	No. of Days	Indicative Schedule
A. MILESTONE ON THE CMRRC POCKET WORKSHOP		
Conduct of Corporate Environmental Scanning (SWOT), Stakeholder Analysis, Strategic Risks Assessment, and Needs and Expectations of Interested Parties and revisit of the Management of Change Matrix <u>with Facilitator-Coach Post Report</u> (designed for the CMRRC)	2 days	within May/June 2023
B. MILESTONE ON THE STRATEGIC PLANNING POCKET SESSIONS FOR CY 2024		
Conduct and facilitation of preparatory pocket meetings in view of the Mid-year Strategic Planning for CY 2024, with in session coaching incorporated in the FGDs, to pre-identify constraints and issues and refine projected CY 2024 PPAs (e.g. according to level of priority, budget implications, staffing requirements, etc.) <u>with Facilitator-Coach Post Report</u> (designed for by office or department consultations)	10 half-days	within June to July 2023
C. MILESTONE ON THES STRATEGIC PLANNING FOR CY 2024		
Strategic Planning for 2024 1 Review TPB’s Performance as of Q2 2023, PES Results and implementation to-date of PPAs against Targets 2 Presentation of the NTDP 2023-2028 for strategic alignment 3 Revisit of the TPB Vision, TPB Mission, TPB Core Values (determination if changes are to be applied)	4 days	11-14 July 2023

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	<p>4 Review of the TPB Strategy Map and formulation of the Performance Scorecard, including the strategic objectives, strategic measures and targets for FY 2024</p> <p>5 Preparation-formulation of 2024 Strategic Initiatives (clustered by mandate 1, 2, 3)</p> <p>6 Consolidation and Ways Forward <u>with Facilitator-Coach Post Event Engagement Synthesis Report</u></p> <p><i>(designed for the MANCOM and key personnel)</i></p>			
	D. MILESTONE ON THE CPBD PERFORMANCE MANAGEMENT WRITESHOP AND PLANNING AND TRAINING WORKSHOP FOR CY 2024			
	<p>First Leg: CPBD Performance Management Writeshop for CY 2024 Geared towards the production of the draft Consolidated Performance Targets and Rating Guide for CY 2024 (OPCRs, DPCR's)</p> <p>Second Leg: CPBD PLANNING AND TRAINING WORKSHOPS FOR CY 2024 Geared towards establishing an effective performance monitoring and reporting system preparatory to automating TPB's internal PES and SPMS by CY 2024 and to facilitate planning competencies enhancement and the finalization of CPBD's PPAs for CY 2024 <u>with Facilitator-Coach Post Report</u></p> <p><i>(designed for the CPBD Department)</i></p>	<p>2x 3-day sessions</p>	<p>within October to November 2023</p>	
	E. MILESTONE ON THE TPB PERFORMANCE MANAGEMENT CALIBRATION POCKET WORKSHOPS			

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	TPB Performance Management Calibration Pocket Meetings Geared towards the finalization of the Summary of Consolidated Performance Targets and Rating Guide for CY 2024 (OPCRs, DPCR)s <u>with Facilitator-Coach Post Report</u> <i>(designed for the Line Departments and the CA Sector, MP Sector)</i>	2x 2-day sessions (2-days) (2-days)	within November 2023	
	F. MILESTONE ON THE TPB YEAR-END PERFORMANCE ASSESSMENT			
	<ul style="list-style-type: none">• Performance Validation for CY 2023• Strategic Planning for 2024 1 2023 Performance Assessment (PES Results and implemented PPA reports) 2 Cluster presentation of the strategic and operational plans for CY 2024 based on the finalized Performance Targets for CY 2024 resulting from the TPB Performance Management Calibration Pocket Meetings 3 Critiquing by the COO and MANCOM 4 Sealing of the TPB Performance Commitments vis-à-vis the PES Targets for 2024 <u>with Facilitator-Coach Post Event Engagement Synthesis Report</u> <i>(designed for the MANCOM and key personnel)</i>	4-days	within November/ December 2023	
<p><i>The Bidder shall submit a Program Flow/Outline of the Training Session(s) based on the proposed timeline and activities</i></p> <p><i>Note: The proposed activities and time frames may be adjusted subject to the recommendations of the service provider and the approval of TPB</i></p>				

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10	DURATION OF ENGAGEMENT <p>The engagement of the Facilitator-Coach for the QMS Planning Sessions of TPB for CY 2023 and 2024 will start from the date of acceptance of the Notice to Proceed (NTP) until all deliverables have been complied with but should not exceed 29 December 2023.</p>	
11	TPB RESPONSIBILITIES: <ol style="list-style-type: none"> 1. Coordinate the pre-work required prior to the event; 2. Provide the necessary documents and materials needed by the Facilitator-Coach; 3. Invite and ensure the attendance of the targeted participants; 4. Provide when needed the accommodation, venue, and meals of the participants for the duration of the workshops; 5. Provide when needed the accommodation and meals of the Facilitator-Coach and support team (maximum 4 persons) for the duration of the workshops; 6. Purchase and reproduction of materials and manuals needed for the workshops 7. Provide the external provider's team with a working area in TPB during visit (as applicable) 8. Ensure that training equipment, such as LCD projector, projector screen, microphones, speaker, flip chart stands and whiteboard and other materials required by the Facilitator-Coach are available for use during the workshops (as applicable); 9. Ensure that an online facility (i.e., online video conferencing) is available in case of a hybrid-type of activity is preferred, as agreed upon by the consultant/ consulting firm and the TPB; 10. Pay the professional fee and shoulder the costs of other expenses incidental to the conduct of activities specified in this TOR; and 	

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	<p>11. Out-of-Pocket Costs: additional travel expense (RT PCR Tests, other expenses) to be incurred that are not included in the financial proposal of the winning supplier shall be approved by TPB prior to implementation</p>					
12	<p>TERMS OF PAYMENT</p> <p>Supplier preferably with a Landbank account. Payment will be made through LBP bank deposit. In case the supplier does not have a Landbank account, bank charges will be shouldered by the supplier.</p> <p>TPB reserves the right to withhold all or a portion of payment if performance is deemed unsatisfactory, if work/output is incomplete, not delivered or failed to meet deadline/s set; or all other factors in breach of the TOR.</p> <p>The indicative payment scheme is as follows:</p> <table><tr><th>DELIVERABLES: Outputs/Milestone</th><th>Payments</th></tr><tr><td colspan="2">Tranche 1</td></tr></table>	DELIVERABLES: Outputs/Milestone	Payments	Tranche 1		
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Tranche 1						

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	<p>Upon satisfactory conduct and completion of the:</p> <ul style="list-style-type: none"> • CMRRC POCKET WORKSHOP with post-report <ul style="list-style-type: none"> ○ TPB Corporate SWOT Analysis ○ Stakeholder Analysis ○ Strategic Risk Register and attendant Risk Control Plan ○ TPB IP-RNEs Matrix ○ Updated Management of Change Matrix • STRATEGIC PLANNING POCKET SESSIONS FOR CY 2024 with post-report <ul style="list-style-type: none"> ○ Non-consolidated preliminary PPA line-up for CY 2024 ○ Identified constraints, issues and refinement applications • STRATEGIC PLANNING FOR CY 2024 with post engagement synthesis report <ul style="list-style-type: none"> ○ CY 2023 Reprogramming (only as applicable) 	<p>50% of the Contract Amount</p>		
Tranche 2				
	<p>Upon satisfactory conduct and completion of the:</p> <ul style="list-style-type: none"> • CPBD PERFORMANCE MANAGEMENT WRITESHOP FOR CY 2024 with post report <ul style="list-style-type: none"> ○ Draft Summary of Consolidated Performance Targets and Rating Guide for CY 2024 (OPCRs, DPCRs) • CPBD PLANNING AND TRAINING WORKSHOPS FOR CY 2024 with post report <ul style="list-style-type: none"> ○ Design of a monitoring and reporting template/system adoptable to an automated system (PES and SPMS) ○ Draft CPBD's PPAs for CY 2024 • TPB PERFORMANCE MANAGEMENT CALIBRATION POCKET WORKSHOPS with post report <ul style="list-style-type: none"> ○ Draft calibrated and vetted Summary of Consolidated Performance Targets and Rating Guide for CY 2024 (OPCRs, DPCRs) • TPB YEAR-END PERFORMANCE ASSESSMENT with post engagement synthesis report 	<p>50% of the Contract Amount</p>		

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	<p>○ Draft WFP</p>		
	<p>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.</p>		
13	<p>Invitation to Suppliers:</p> <p>The Service Provider is expected to submit technical and financial proposals which shall include:</p> <ul style="list-style-type: none"> • A brief profile and description demonstrating the professional/company qualification indicated in item V; • Curriculum vitae of key personnel who will be assigned in the projects showing competency, experience and areas of specialization using the TPF6 Form; • List and evidence of relevant work experience for the last five (5) years (2017-2022 timeline); • The winning bid shall be determined based on the Single or Highest Rated Bid provided that the amount of the bid does not exceed the above-mentioned ABC. 		

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14	Bidders are required to present their plan of approach for the project (maximum of 20 minutes). Hurdle rate for Technical Proposal: At least 85% Indicative Date of Presentation: June 2, 2023 2:00 P.M			
15	REQUIREMENT		Facilitator-Coaching Services	
	PROJECT TITLE		TPB Quality Management System Planning Events for CY 2023 and CY 2024	
	APPROVED BUDGET COST (ABC)		PhP 950,000.00	
	(Name)			
	Rating Criteria		WEIGHT	
	Technical Proposal		85%	
	Applicable Experience as part of the basis for evaluation which includes that:			
	○ Bidder must be a Filipino or a Filipino-owned and registered company in the Philippines engaged in the business of training facilitation or similar engagements for the last five (5) years (25 pts);		(25 pts)	
	Quality of project personnel; i.e., suitability of proponent/key staff to perform the project’s scope of work, general qualifications and competence including the professional experience of the proponent/key staff (30 pts) which includes:			
	○ Minimum of three (3) years’ experience in conducting and facilitating competency and QMS based planning workshops and interventions in the private and government sectors including ISO 9001:2015 consultancy work; and		(5 pts)	
	○ All key personnel to be assigned to the project shall have:			
● relevant work experience in conducting and facilitating planning workshops and interventions in the private and government sectors,		(5 pts)		

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		and			
		<ul style="list-style-type: none">extensive working knowledge on competency based Performance Management System, the GCG-prescribed Performance Scorecard; and shall have recently assisted a government agency in the establishment of its Corporate and Functional Quality Objectives and/or Annual Planning	(10 pts)		
		<ul style="list-style-type: none">The relevant work experience and extensive working knowledge shall be as follows:	(10 pts)		
		Key Personnel			
		Lead Facilitator/s			
		Subject Matter Experts			
		Project Manager			
		Admin/Support Staff			
		Plan of approach and methodology, i.e. clarity, feasibility, innovativeness, and comprehensiveness of the proposal (45 pts)	(45 pts)		
		Financial Proposal (100 pts)	15%		
Total	100%				
		FACTORS	TOTAL R PER RF x %		
		I. TECHNICAL PROPOSAL	100 x (.85) =85		
		II. FINANCIAL PROPOSAL	100 x (.15) =15		
		TOTAL (Passing Rate = 85%)	100%		
		PROJECT OFFICER/CONTACT PERSON:			
Mr. WILSON R. SUBA Acting Head					

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Corporate Planning & Business Development Department
E-mail address: wilson_suba@tpb.gov.ph
Tel. No: 525-6443 / 525-9318 local 209

I hereby certify to comply and deliver all of the above requirements.

Name of Company

Signature over Printed Name
of Authorized Representative

Date

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