

ANNEX A: TERMS OF REFERENCE

PROCUREMENT OF SERVICES OF AN EVENT MANAGEMENT COMPANY (EMC)/ PROFESSIONAL CONGRESS ORGANIZER (PCO)/EDUCATION AND TRAINING SERVICES (ETS) TO CONDUCT THE HYBRID SEMINAR ON DIGITAL MARKETING, CAPACITY BUILDING AND SKILLS DEVELOPMENT

August 2023, Boracay Island

(Date is subject to change)

I. BACKGROUND

Mandated by Republic Act 9593, the TPB Membership Program aims to provide marketing services and benefits to members through various activities that promote, advocate, and represent the interests of its members for the benefit and sustainable development of their businesses and tourism industry as a whole. The three (3) primary areas where TPB assists its members are promotional assistance, targeted market intelligence, and sustainable business generation.

Part of the TPB's commitment to its members is to provide training programs to strengthen their marketing capability. In the last two years, the TPB has conducted four (4) virtual and two (2) hybrid seminars on digital marketing, leadership, regaining business, sustainable tourism and other relevant topics, to assist members in post-pandemic recovery.

For 2023, following the staging of the last two seminars in Metro Manila and CALABARZON, the seminar will be staged in Region 6 (Boracay Island) in an effort to bring the seminars closer to members based in the regions. It will be conducted in a hybrid format, with indicative topic centered on digital marketing and will take on a whole-day format to include plenary and workshop sessions.

The seminar is aimed at further strengthening stakeholder capacity through the industry's post-pandemic recovery. Target audience are TPB member-establishments and other tourism stakeholders.

II. OBJECTIVES

1. To increase the marketing capability of members to meet current and 'new normal' needs
2. To assist members in recovery efforts, enabling them to come out of the ongoing pandemic with new strategies to move forward
3. To provide platforms and marketing initiatives for members to generate more business for their companies
4. To strengthen collaboration and partnership with the private sector

III. SCOPE OF WORK/SERVICES

Components of the Program:

Hybrid Seminar on Digital Marketing, Capacity Building and Skills Development Seminar Session Management and Live Streaming Process (Plenary-Workshop Format)

Target Audience: TPB Members and other tourism stakeholders

Physical/onsite – 50 members

Virtual – 200 - 500 TPB members and other stakeholders

Proposed Program

Outline:

- Introduction
- Welcome
Remarks
- Plenary Session – Speakers’ Presentations
- Q&A
- Workshop
- Presentation of Outputs
- Synthesis
- Closing Remarks

Pre-Event:

- a. Seminar program conceptualization and planning. Formulate a methodological framework of the determined topics
- b. Provision of 3-4 resource speakers and facilitators, from a roster of a minimum of 6 speakers appropriate for the theme who would allow for live streaming/recording of session for on demand video, for selection/approval by TPB. The TPB may suggest preferred speakers.
- c. Provision of all logistical requirements needed by the resource speakers/facilitators including transportation, transfers, accommodation and meals
- d. Creation and dissemination of an e-poster/invite, e-reminders, follow up e-mails
- e. Conduct of pre-event attendance promotion
- f. Development, management and handling of participants’ online registration, confirmation, attendance and inquiries (provision of contact person/email for such)
- g. Sending electronic direct mails to all participants to include event reminders, link/s for live streaming, on demand/recorded sessions, etc.
- h. Development of an online survey/evaluation of the seminar and submission of a statistical report and analysis based on the result

- i. Conduct of a pre-event orientation and preparation assistance including technical rehearsals of all speakers
- j. Provision of e-copy of the speakers' presentations to all participants
- k. Conduct of a dry-run of the program at least 3 days before actual date
- l. Production of pre-recorded AVPs or speech from TPB or DOT officials who might not be available during the seminar proper
- m. Preparatory work for the participants prior to the seminar proper, if necessary
- n. Provision for early ingress requirements including expenses related to additional hours for set up, if necessary

Actual Event:

- a. In-charge of the overall proceeding of the seminar based on the approved Program
- b. Provision of stage design/set-up including technical and AV requirements (LED screen)
- c. Provision of audiovisual set-up with capability to host and livestream with any available video conferencing platform such as Zoom and Facebook live streaming
- d. Provision for internet capability for hosting video conferencing platform
- e. Script writing for all sessions
- f. Provision of session moderator/s to introduce speakers and to facilitate Q&A and synthesis
- g. Cross-posting of the event on the TPB Facebook page
- h. Provision of 70 souvenir items/sets (minimum P600.00 each) in reusable packaging (Item/s and designs subject to the approval of the TPB Project Officer)
- i. Photo and video documentation of event with the following outputs: 2-3 minute event highlights video (submission within one week from event), minimum 200 color-enhanced images (submission of initial 20 images of highlights one day after event), raw footages and images. (Subject to the approval of the TPB Project Officer).

Post-Event:

- a. Dissemination of seminar Certificates of Attendance (hard copy for onsite attendees to be issued onsite and digital copy for virtual attendees)
- b. Consolidation of speakers' presentations and dissemination to all participants
- c. Uploading of on-demand content on the TPB Membership Website (subject to end user's confirmation)
- d. Payment and processing of speakers' honorarium and applicable professional fees
- e. Submission of data analytics (registration total, demographics, attendee profile, attendee engagement, etc.) and participants' evaluation reports
- f. Submission of all recorded content and post-event report
- g. Submission the final consolidated output of photo and video documentation stored in a flash/hard drive.
- h. Delivery of prizes of up to 10 winners

Others:

1. Develop and implement the seminar based on agreed upon project budget
2. Provide administrative support as follows:
 - Develop a work program with the corresponding timeline and provide regular and timely feedback/status of preparations to TPB
 - Coordinate with TPB on the overall execution of the event, promotion, as well as budget allocation
 - Handle the documentation of all events/activities and maintain an efficient filing and referencing system of all documents
3. Provide a dedicated Overall Project Manager and a full-time secretariat with ample and efficient personnel to manage the preparation, planning, coordination, and conduct of the event
4. Update TPB on a regular basis on the progress status of the event
5. Provide (Survey) Customer Satisfaction Feedback System and ensure collection of at least 75% of the total number of participants.
6. Databases and applications, if any, must be turned over to TPB
7. Compliance with the Data Privacy Act for the database created and all session recordings
8. Turnover to TPB three (3) copies of the Course Module and Terminal Report including:
 - Executive summary
 - Content of the online program
 - Seminar output
 - Transcription of viewers' comments/feedbacks
 - Survey results
 - Evaluation/recommendation
 - List of onsite/online registrants/participants
 - Speakers' presentations

Copies are for the TPB Domestic, Corporate Planning and Finance departments, and will serve as reference for the conduct of future seminars, and to support the processing of payment.

Indicative Schedule of Activities (subject to change)

Time	Activity
Evening of previous day	Ingress
8:30 AM	Registration
9:00 AM	Seminar proper Plenary Session

	AM snack in between
12:00 PM	Lunch Break
1:00 PM	Workshop Session
3:30 PM	Presentation of Outputs/Critique
5:00 PM	Synthesis and Closing
5:30 PM	End of Seminar
6:00 PM	Egress

IV. INDICATIVE PROJECT IMPLEMENTATION SCHEDULE

The project consists of one run, with **indicative** details as follows:

Date	Venue	Topic	Format
06 July 2023 (seminar proper)	Boracay Island; Preferably TPB member-establishment	Digital Marketing or other marketing/business-related topic	Hybrid; Whole day seminar with plenary session in the morning and workshop in the afternoon

V. GENERAL REQUIREMENTS

Manage the events listed below on a turnkey basis from planning and preparation to execution and documentation.

1. Date is subject to change due to weather conditions and meeting and travel restrictions based on resolutions and pronouncements made by the IATF, Philippine Government or concerned Local Government Units.
2. Provide services on a “send-bill” arrangement. Processing of payment shall be initiated upon certification by the end-user of satisfactory completion of services and issuance of billing statements accompanied by supporting documents by the supplier. Payment must be made in accordance with prevailing accounting and auditing rules and regulations.

VI. QUALIFICATION OF BIDDER

1. Bidder must be a company duly-organized under the Philippine laws.
2. Bidder must have been in operation as an EMC/PCO/ETS for at least 5 years.
3. Bidder must be an EMC/PCO/ETS with experience of at least 3 years in handling online/hybrid events, training, or seminars of similar nature.

4. Bidder must have successfully implemented online/hybrid events of similar nature within the last 3 years (minimum of 5 projects with at least 1 government client). Bidder to provide Certificate of Satisfactory Completion.
5. Key personnel involved in the project must have a minimum of 3 years of relevant experience in the conduct of similar work, supported by CVs:
 1. Project Manager (1 personnel)
 2. Content Manager (1)
 3. Graphic Designer (1)
 4. Director/Technical Director/Production Manager (1)
 5. Technical Support Team (2)

****Note:** 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 **ONE MILLION FIVE HUNDRED THOUSAND PESOS (PHP 1,500,000.00) ONLY**, inclusive of all applicable taxes.

The cost of items in the bid should be broken down. 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 a time and place specified in the bidding documents.

Indicative Budget is as follows:

COMPONENT	AMOUNT IN PHP
Formulation of Program, content/module preparation, seminar session management, speakers and moderator/s, provision of honorarium of local or foreign speakers and technical staff, technical requirements, livestreaming digital platform, pre and post-event management requirements, management fee, logistical/ operational expenses and 12% VAT and other applicable fees	PHP 1,500,000.00
TOTAL	PHP 1,500,000.00

VIII. DELIVERY SCHEDULE

OUTPUT / MILESTONE	INDICATIVE TIMELINE
1. Timeline and Gantt Chart	Within one week upon issuance of NTP
2. Mock-up designs of posters (based on the approved theme) for the seminar	
3. Concept, topics, program, course outline, proposed speakers	
4. Registration form, speakers' profile, poster design, streaming platform and other pre-event requirements	3 days upon approval of mock-up design
5. Dry run	4 th week of June 2023
6. Conduct of event proper	6 July 2023
7. Post-event requirements	2 nd week of July 2023
8. Overall completion of services required for the implementation of the project	End-July 2023
9. Post-event report, data analytics report, database, and all recorded content	

IX. TERMS OF PAYMENT

OUTPUT / MILESTONE	PAYMENT AMOUNT
1. Upon approval by TPB of the Timeline and Gantt Chart	15% of the total contract price
2. Upon submission of concept, topics, program, and course outline	
3. Upon approval of concept, topics, program, course outline, registration form, speakers' profile, poster design, streaming platform and other pre-event requirements	40% of the total contract price
4. Upon completion of the seminar and submission of post-event report, data analytics report, database, and all recorded content	45% of the total contract price

X. ADDITIONAL REQUIREMENTS

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 weight assignment:

Proposal	Weight
Technical Proposal	85%
Financial Proposal	15%

XI. RATING GUIDE FOR TECHNICAL PROPOSAL

A. Eligibility Check and Shortlisting Criteria and Rating (80% passing score)

	PARTICULARS	%	RATING
I.	Applicable Experience of the Firm		50%
	a. Bidder must have been in operation as an EMC/PCO/ETS for at least 5 years		
	More than 6 years of experience (30%)		
	5-6 years of experience (25%)		
	Below 5 years of experience (0%)		
	b. Successfully implemented similar projects within the last 3 years (minimum of 5 projects with at least 1 government client) <i>Bidder to provide Certificate of Satisfactory Completion</i>		
	Minimum of 5 projects, with 2 or more government clients (20%)		
	Minimum of 5 projects, with 1 government client (15%)		
	Less than 5 projects and no government client (0%)		
II.	Qualification of personnel who may be assigned to the project		30%
	All key personnel have minimum 3 years of relevant experience in the conduct of similar work		
	All key personnel have more than 3 years of relevant work experience (30%)		
	One or more key personnel has 3 years of relevant work experience (25%)		
	One or more key personnel has less than 3 years of relevant work experience (0%)		
III.	Current Workload relative to Capacity		20%

	Currently handling 5 or less projects (20%)		
	Currently handling 6-10 projects (15%)		
	Currently handling more than 10 projects (0%)		
	TOTAL		100%

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

Bidders are required to present their plan of approach for the project (maximum of 20 minutes).

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

	PARTICULARS	%	RATING
I.	Quality of Personnel to be assigned to the Project		30%
	<p>Profile and expertise of key personnel assigned to the project showing specialization and/or experience in the conduct of similar events, training or seminars with minimum experience of 3 years:</p> <ul style="list-style-type: none"> • Project Manager (1 personnel) • Content Manager (1) • Graphic Designer (1) • Director / Technical Director / Production Manager (1) • Technical Support Team (2) <p>Covering the suitability of the key staff to perform the duties of the particular assignments with general qualifications and competence including education, training, and similar projects handled by personnel (based on submitted CVs)</p>		
II.	Firm Experience and Capability		30%
	Bidder has presented evidence in implementing/managing similar projects whose quality is acceptable to the hybrid seminar requirement.		
	More than 3 online/hybrid events, training or seminars conducted in the last 3 years (30%)		
	3 online/hybrid events, training or seminars conducted in the last 3 years (25%)		
	Less than 3 online/hybrid events, training or seminars conducted in the last 3 years (0%)		
III.	Plan of Approach and Methodology		40%
	<p>a. Adherence of the proposal to all the required components of the hybrid seminar as mentioned in this bid (20%)</p>	20%	

	b.	Relevance of the concept, proposed topics, and speakers. Profiles of speakers and list of topics to be submitted (15%)	15%	
	c.	Feasibility of the planned execution of the overall scope of work (5%)	5%	
	TOTAL			100%

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***** NOTHING FOLLOWS *****