

**Terms of Reference**  
**Consultancy Services for Technical Assistance in Enhancing and Executing the Planning Activities**  
**of the Tourism Promotions Board for CY 2025 - 2026**

**I. BACKGROUND**

The Tourism Promotions Board (TPB) Philippines was established pursuant to Republic Act (R.A.) No. 9593, also known as the Tourism Act of 2009. TPB operates under the supervision of the Secretary of Tourism and is attached to the Department of Tourism (DOT) for purposes of program and policy coordination.

TPB is tasked with the following responsibilities:

1. To market and promote the Philippines both domestically and internationally as a premier global tourism destination, emphasizing its unique offerings and supporting the development of its tourism products and services, with the goal of increasing tourist arrivals and tourism investments;
2. To position the Philippines as a leading MICE (Meetings, Incentives, Conferences, and Exhibitions) destination by attracting, promoting, facilitating, and servicing large-scale events, international fairs and conventions, congresses, sports competitions, expositions, and similar activities;
3. To ensure the regular advertisement of the country's major tourism destinations and other tourism products, including Tourism Enterprise Zones (TEZ), both locally and internationally; and
4. To ensure that the Work and Financial Plans of TPB, as well as its programs, plans, and activities in the short, medium, and long terms, consistently align with and support the Socio-Economic Agenda of the administration, the Philippine Development Plan, and the National Tourism Development Plan. Planning is a crucial function that ensures the achievement of intended outcomes and results.

In order to optimize its planning activities, the agency seeks specialized technical assistance to further enhance its planning capabilities. TPB is therefore inviting proposals from consulting firms or individual consultants with experienced Subject Matter Experts (SMEs) to provide expert support to the TPB Management Committee and the TPB Corporate Planning and Business Development (CPBD) Department. This consultancy will play a critical role in enhancing the design of planning activities and capacity-building efforts for TPB management, participating Project Officers, and the CPBD Department, ensuring that the entire planning cycle is cohesive, executable, and fully aligned with the National Tourism Development Agenda.

**II. OBJECTIVES**

The consultancy aims to provide technical assistance to the TPB Management, participating Project Officers, and the TPB Corporate Planning and Business Development (CPBD) Department in the following key areas:

1. **Provide Technical Guidance:** Offer expert advice on the design and implementation of activities for the Annual Mid-year Planning Catch-up, Operational Planning 2026, and Departmental Planning 2026 ensuring alignment with TPB's strategic goals and objectives.

2. **Offer Technical Leadership and Direction:** Provide overall leadership and direction to the planning team, serving as a technical resource for workshops, activities, and planning sessions. This includes delivering presentations on key topics such as futures thinking, strategic foresight, sustainability, anticipatory planning, governance, and management.
3. **Assess the Current Planning Setup:** Conduct a comprehensive assessment of TPB's institutional, operational, and management planning framework, comparing it with intended short-, medium-, and long-term performance outcomes. Based on this evaluation, formulate and present actionable recommendations for:
  - a. Providing TPB Management with critical information to inform decision-making, identify areas requiring immediate attention, and establish pathways for developing key programs aimed at improving planning and project management practices.
  - b. Identifying necessary changes in the current operating system to enhance the efficiency of planning and program completion within established timelines.

This consultancy will ultimately enhance TPB's planning and project management processes, thereby strengthening its capacity to effectively support the National Tourism Development Agenda.

### III. SCOPE OF SERVICES AND TIME SCHEDULE

The consulting services will provide comprehensive technical assistance and facilitate the effective implementation of the required planning sessions for the Tourism Promotions Board (TPB) in CY 2025. This will include serving as the primary advisor in the execution of planning activities, such as Strategic Assessment and Review, Operational Planning, and Departmental Planning. Additionally, the consultant will develop essential planning resources, serve as a Subject Matter Expert (SME) in conducting executive briefings on planning, and deliver targeted capacity-building programs to enhance foundational, technical, and organizational competencies in planning and project management across the organization. The following outlines the deliverables required as part of this consultancy:

Deliverables	Scope of Services	Indicative Time Schedule
<b>Technical Assistance and Subject Matter Expertise</b>		
Provide expert advice and executive summary reports on all planned planning activities	<ol style="list-style-type: none"> <li>1. Serve as the overall advisor to TPB in executing its:               <ol style="list-style-type: none"> <li>a. Pre-work for the Annual Mid-year Planning Catch-up: Review of Strategic Priorities and Performance Assessment</li> <li>b. Conduct of the Annual Mid-year Planning Catch-up: Review of Strategic Priorities and Performance Assessment</li> <li>c. Pre-work for the Operational Planning</li> <li>d. Operational Planning</li> <li>e. Departmental Planning</li> </ol> </li> <li>2. Facilitate the conduct of discussions;</li> </ol>	<ol style="list-style-type: none"> <li>1.               <ol style="list-style-type: none"> <li>a. June 2025</li> <li>b. July 2025</li> <li>c. August to October 2025</li> <li>d. November 2025</li> <li>e. November to December 2025</li> </ol> </li> <li>2. All throughout the duration of engagement</li> <li>3. All throughout the duration of engagement</li> </ol>

	<ol style="list-style-type: none"> <li>3. Document the proceedings, including key discussions, agreements, and forward plans of TPB; and</li> <li>4. Prepare and submit Reports for each of the five legs of the planning activities</li> <li>5. Recommend actionable insights on the current institutional, operational, and management planning setup of TPB, and incorporate these recommendations into the Engagement Synthesis Report</li> </ol>	<ol style="list-style-type: none"> <li>4. All throughout the duration of engagement</li> <li>5. All throughout the duration of engagement</li> </ol>
<b>Scope of the Planning Activities/Sessions</b>		
Pre-work for the Annual Mid-year Planning Catch-up: Review of Strategic Priorities and Performance Assessment	<ol style="list-style-type: none"> <li>1. Design and conduct of the activities to cover:               <ol style="list-style-type: none"> <li>a. CY 2025                   <ul style="list-style-type: none"> <li>- Performance Assessment</li> <li>- Catch-up Strategies and Plans</li> </ul> </li> <li>b. CY 2026                   <ul style="list-style-type: none"> <li>- Establishing and reaffirming the environmental context for the development of the a</li> <li>- Key project priorities, milestone PAPs identification</li> <li>- Stakeholder assessment</li> <li>- Resource Planning (People, Finances, Technology, Time)</li> <li>- Strategies and Plans:                       <ul style="list-style-type: none"> <li>▪ Budget, WFP, PAPs, Early Procurement Activities, Projects and Procurement Timelines</li> </ul> </li> <li>- Proposed Performance Scorecard Targets CY 2026</li> </ul> </li> <li>c. Provide necessary tools/ templates</li> <li>d. Summary Report</li> </ol> </li> </ol>	
Annual Mid-year Planning Catch-up: Review of Strategic Priorities and Performance Assessment	<ol style="list-style-type: none"> <li>1. Design activities to engage the Tourism Board and TPB Management Committee in discussions on the following:               <ol style="list-style-type: none"> <li>a. TPB within the framework of the National Tourism Development Plan</li> <li>b. Vision-Mission</li> <li>c. TPB Strategic Directions</li> <li>d. Environmental Context</li> <li>e. Actionable Insights for the current and succeeding year                   <ul style="list-style-type: none"> <li>- 2025 Catch-up Plan</li> <li>- 2026 WFP, Key Initiatives, Performance Targets for CY 2026</li> </ul> </li> </ol> </li> <li>2. Provide necessary tools/ templates</li> <li>3. Summary Report</li> </ol>	

Pre-work for the Operational Planning	<ol style="list-style-type: none"> <li>1. Design and conduct of the activities to cover CY 2026:               <ol style="list-style-type: none"> <li>a. Operationalizing the COB Utilization, WFP, PPMP</li> <li>b. Revisit: Key project priorities, milestone PAPs identification</li> <li>c. Leverage: Stakeholder assessment</li> <li>d. Revisit: Resource Planning (People, Finances, Technology, Time)</li> <li>e. Design: Implementation of the planned programs considering First Semester (improve performance) vs Second Semester Performance (lessen activities, increase disbursements)</li> <li>f. Revisit and Affirm: Proposed Performance Scorecard Targets CY 2026</li> </ol> </li> <li>2. Provide necessary tools/ templates</li> <li>3. Summary Report</li> </ol>	
Operational Planning	<ol style="list-style-type: none"> <li>1. Design and conduct of the activities to cover CY 2026:               <ol style="list-style-type: none"> <li>a. Engagement of a Tourism Expert                   <ul style="list-style-type: none"> <li>- The Consultant may also recommend the engagement or invitation of an additional resource person, particularly an expert on tourism, to provide further insights during the planning activities subject to the approval of TPB, in the event of an additional resource person, the cost for their services shall be in accordance with DBM Budget Circular No. 2007, billed separately, and shall not form part of the ABC for this engagement.</li> </ul> </li> <li>b. Revisit TPB Strategic Framework/ Directions</li> <li>c. Organizational Performance Goals, Key Agreements</li> <li>d. Resource Allocation</li> <li>e. Presentation of Priority PAPs</li> </ol> </li> <li>2. Provide necessary tools/ templates</li> <li>3. Engagement Synthesis Report/Final Report</li> </ol>	
Departmental Planning	<ol style="list-style-type: none"> <li>1. Organizational Performance Targets               <ol style="list-style-type: none"> <li>a. Formulation of OPCR and DPCR targets based on the results of the Operational Planning;</li> <li>b. Cascading of targets to individual</li> </ol> </li> </ol>	

	<ul style="list-style-type: none"> <li>c. performance commitments (IPCRs).</li> <li>c. Provide necessary tools/ revisit existing templates</li> <li>d. Summary Report of the Conduct of Departmental Planning/ Consolidation of Performance Targets (OPCR-DPCR)</li> </ul>	
<b>Supplementary Tailored Planning Presentations</b>		
Presentation/ Seminar/Primer for the Tourism Board, TPB MANCOM, planning participant, CPBD Staff	<ol style="list-style-type: none"> <li>1. Design and prepare overview presentations on the following topics:               <ol style="list-style-type: none"> <li>a. Futures thinking and strategic foresight and other related topics</li> <li>b. Anticipatory planning, governance and management</li> <li>c. Integrating Sustainability in Tourism Planning and Development</li> <li>d. Operating in a globally competitive landscape and finding/reinventing your edge</li> </ol> <p><i>*Topics may be modified, consolidated, or revised based on the service provider's needs assessment and may be integrated into the activity design, subject to time availability</i></p> </li> <li>2. Certification of participation and/or attendance, as applicable</li> </ol>	

The Subject Matter Expert(s) may likewise be engaged as resource speaker(s) for other institutional development or planning-related training sessions or seminars identified under TPB's major or flagship Programs, Activities, and Projects (PAPs), which are beyond the scope of this engagement. The costs for such services shall be billed separately and shall not be charged against the Approved Budget for the Contract (ABC) for this engagement.

#### IV. SCOPE AND LIMITATIONS

##### 1. Ownership of Outputs

- a. All reports, designs, specifications, and other documents prepared by the Consulting Firm or Individual Consultant for the TPB under this Project shall be considered the property of the TPB. These outputs shall remain exclusively under the ownership of the TPB and may be utilized as deemed necessary by the agency.

##### 2. Prior Approvals

The Consulting Firm or Individual Consultant shall secure the prior approval of the Procuring Entity for the following:

- a. Schedule of activities and deliverables
- b. Accomplished forms, reports, and templates

##### 3. Responsibilities of the Consulting Firm or Individual Consultant

- a. The Consulting Firm or Individual Consultant shall provide all necessary supplies and materials required for the delivery of the agreed-upon services and outputs.

- b. Furthermore, the Consulting Firm or Individual Consultant shall furnish copies of all required outputs, including online file links, in both hard copy and editable digital formats for the use of the Procuring Entity.

**4. Support from the Procuring Entity**

- a. The Tourism Promotions Board (TPB) shall provide appropriate venues for meetings and learning sessions required during the implementation of the Project.

**VI. BIDDER'S ELIGIBILITY REQUIREMENTS AND KEY PERSONNEL**

This consultancy service requires either A.) a consulting firm or B.) an individual consultant, both with experienced Subject Matter Experts (SMEs), to provide specialized support to the TPB Corporate Planning and Business Development (CPBD) Department. Below are the detailed qualifications:

**A. Qualification of the Consulting Firm**

**a. Company Profile**

Must be a Filipino-owned, operated, and legally registered company under Philippine laws and must have been in operation for at least the last five (5) years.

**b. Relevant Experience**

Must have successfully undertaken at least three (3) consultancy services with government organizations, private companies, or non-government organizations.

**c. Required Key Personnel**

The Consulting Firm must provide the following key personnel for the project:

Position	No. of Personnel
<p>Lead Subject Matter Expert (Project Manager)</p> <ol style="list-style-type: none"> <li>1. Preferably a licensed Environmental Planner</li> <li>2. Must have extensive experience in preparing and facilitating various planning activities, including at least three (3) of the following: <ol style="list-style-type: none"> <li>a. Risk-Based Strategic Planning</li> <li>b. Operational Planning</li> <li>c. Strategic Planning</li> <li>d. Sustainable Development</li> <li>e. Development Planning</li> </ol> </li> <li>3. Must have conducted at least five (5) planning engagements with government agencies, GOCCs, and/or LGUs as a Lead Consultant, Project Leader, or Resource Person within the last five (5) years.</li> <li>4. Must have experience in an international capacity through at least one (1) work engagement with a globally recognized institution, organization, or government within the last five (5) years.</li> <li>5. Must have a track record of at least ten (10) training or speaking engagements as a Planning Expert in the last five (5) years.</li> <li>6. Must have a track record of at least five (5) engagements in supervisory, project leader, consultant, or adviser capacity in the last five (5) years.</li> </ol>	1

Position	No. of Personnel
<b>Senior Subject Matter Expert</b> 1. Must have at least one (3) year of experience in preparing, conducting, and facilitating planning activities as outlined in this Terms of Reference. 2. Must be proficient in Microsoft Office applications.	1 or 2
<b>Coordinator/Technical Assistant</b> 1. Must have at least one (1) year of experience in providing technical assistance, including facilitating sessions, preparing session highlights, and documenting proceedings in collaboration with TPB personnel. 2. Must be proficient in Microsoft Office applications.	1 or 2
<b>Maximum of four (4) personnel total</b>	

## B. Qualifications of Individual Consultant

### a. Professional Expertise

- Must have experience equivalent to that of a Lead Subject Matter Expert (Project Manager), as outlined in the consulting firm's key personnel qualifications.

### b. Technical Assistance Option

- The individual consultant shall hire technical assistants, as outlined in the consulting firm's key personnel qualifications, at their own discretion and expense to assist in the delivery of required services and outputs.
- The Curriculum Vitae (CV) of key personnel assigned to the project must be submitted, demonstrating competency and proof of expertise in Planning, including certification signed by an authorized person (for Lead and Senior SMEs), using the TPF Form 6.

## VII. TECHNICAL RATING CRITERIA

Length of Technical Presentation: Bidders are required to present their proposed approach for the project, with a maximum duration of 30 minutes.

Criteria	Percent Weight
<b>I. Applicable experience of the Consultant or Consulting Firm</b>	<b>30%</b>
<b>A. For Individual Consultant:</b> Must be a Filipino engaged in providing training facilitation or similar services for the last five (5) years. - With consultancy engagements of more than five (5) years = 10% - With consultancy engagements of five (5) years = 5%  <b>For Consulting Firm:</b> Must be a Filipino-owned, operated, and legally registered consulting firm under Philippine law, with at least five (5) years of operation. - More than five (5) years of operation = 10% - At least five (5) years of operation = 15%	10%
<b>B.</b> Must have successfully completed at least three (3) consultancy services with government organizations, private organizations, or non-government organizations. - More than three (3) successful consultancy services = 10% - At least three (3) successful consultancy services = 5%	10%

Criteria	Percent Weight
<b>C. For Individual Consultant:</b> - Must be a licensed environmental planner = 10%  <b>For Consulting Firm:</b> - The Lead Subject Matter Expert (Project Manager) must be a licensed environmental planner = 10%	10%
<b>II. Qualifications of SMEs of the Individual Consultant or Consulting Firm who may be assigned to the job</b>	<b>50%</b>
<b>A. Must have extensive experience in preparing and facilitating various planning activities, including at least three (3) of the following: Risk-Based Strategic Planning, Operational Planning, Strategic Direction, Sustainable Development, and/or Development Planning. (Lead SME)</b> - Has covered more than three (3) of the indicated planning activities = 10% - Has covered at least three (3) of the indicated planning activities = 5%	10%
<b>B. Must have conducted at least five (5) planning engagements with government offices, GOCCs, and/or LGUs as Lead Consultant, Project Leader, or Resource Person in the last five (5) years.</b> - Conducted more than five (5) sessions = 10% - Conducted at least five (5) sessions = 5%	10%
<b>C. Must have experience in an international capacity through at least one (1) work engagement with a globally recognized institution, organization, or government in the last five (5) years.</b> - More than one (1) engagement = 5% - One (1) engagement = 2.5%	5%
<b>D. Track record of at least ten (10) training or speakership engagements as a Planning Expert in the last five (5) years. (Lead SME)</b> - Conducted than ten (10) engagements = 10% - Ten (10) engagements = 5%	10%
<b>E. Track record of at least five (5) engagements in a supervisory capacity, project leader, consultant, or adviser role in the last five (5) years. (Lead SME)</b> - More than five (5) engagements in a supervisory capacity = 5% - Five (5) engagements in a supervisory capacity = 2.5%	5%
<b>F. Must have experience in preparing, conducting, and facilitating planning activities as outlined in the Terms of Reference. (Senior SME)</b> - More than three (3) years of experience = 5% - At least three (3) years of experience = 2.5%	10%
<b>III. Plan of approach and methodology</b>	<b>20%</b>
A. Consistency of the proposed workplans with the Scope of Work.	10%
B. Project plan approach to achieve the deliverables/expected outputs within the specified timeframe.	10%

**Passing score: 85%**

The Individual Consultant or Consulting Firm is expected to submit technical and financial proposals, which will be evaluated based on the **Quality Cost-Based Evaluation (QCBE)** method. The winning bidder must achieve a hurdle rate of **eighty-five percent (85%)** based on the following set of selection criteria, along with their corresponding weight assignments:



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

## VIII. DURATION OF CONTRACT

The services of the Individual Consultant or Consulting Firm shall be engaged for a period of twelve (12) months from the receipt of the Notice to Proceed. They shall report directly to the Corporate Planning and Business Development (CPBD) Department.

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

The Approved Budget for the Contract (ABC) is **ONE MILLION PESOS ONLY (PHP1,000,000.00)**, inclusive of all applicable fees and taxes. The ABC shall be charged to the CPBD Department's FY 2025 funds, subject to existing accounting, auditing, and budgeting rules and regulations.

## X. TERMS OF PAYMENT

Payments for corresponding milestones may be processed based on the actual completion of services and deliverables and may not follow a chronological order.

Payment Terms	Deliverables/Milestones	Percentage of Payment
1st	Submission of Inception Report on the Proposed Planning Activities	15%
2nd	A. Conduct of the Annual Mid-year Planning Catch-up: Review of Strategic Priorities and Performance Assessment B. Submission of Activity Report	30%
3rd	A. Conduct of Operational Planning B. Submission of Activity Report	30%
	A. Conduct of Departmental Planning B. Submission of Activity Report	15%
4th	Submission of Final Report on the Completed Planning Activities	10%
<b>TOTAL:</b>		<b>100%</b>

## XI. TPB RESPONSIBILITIES

1. Coordinate the pre-work required before the event.
2. Provide the necessary documents and materials for the Consultant.
3. Invite and ensure the attendance of the targeted participants.
4. Provide accommodation, venue, and meals for participants, as needed, during the workshops.
5. Provide accommodation and meals for the Facilitator and support team (maximum of 4 persons) during the workshops, as needed.

6. Out-of-town expenses for the Consultant, such as accommodation, airfare, transportation, meals, etc., shall be charged to TPB.
7. Provide the external provider's team with a working area at TPB during their visit (as applicable).
8. Ensure that training equipment, such as an LCD projector, projector screen, microphones, and speakers, are available for use during the workshops (as applicable).

## **XII. INVITATION TO SUPPLIERS**

The Service Provider is expected to submit technical and financial proposals, which shall include the following:

1. A brief profile and description demonstrating the qualifications of the professional or company as outlined in **Item VI. Bidder's Eligibility Requirements and Key Personnel**.
2. List of at least three (3) successfully undertaken consultancy services with government organizations, private companies, or non-government organizations. *(For Consulting Firm)*

## **XIII. PROJECT OFFICER/CONTACT PERSON**

### **Ms. SHERYLL ANN R. KARUNUNGAN**

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