

## TERMS OF REFERENCE

### CONSULTING SERVICES FOR THE MAINTENANCE AND IMPROVEMENT OF THE TOURISM PROMOTIONS BOARD'S ISO 9001:2015 QUALITY MANAGEMENT SYSTEM

#### I. PROJECT

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

#### II. BACKGROUND

TPB, a certified ISO 9001:2015 compliant agency successfully passed its 2<sup>nd</sup> Surveillance Audit conducted last 24 October 2023.

This was the ninth 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 its established QMS in different respective areas of the Corporation 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 the:

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; and
4. Conduct training or workshops for better understanding of the participants

#### **V. ELIGIBILITY REQUIREMENTS**

##### Qualifications of the Consulting Firm

1. Must have been in the industry for the last five (5) years, handling consulting projects 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 a QMS leading 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 contracts for the last five (5) years whether similar or not similar in nature to this project. The format shall include the name of the agency, title of the project and the amount of the contract.
    - For Ongoing Project/s – submit any of the following: Notice of Award, Notice to Proceed, or Contract
    - For Completed Project/s – submit Certificate of Project Completion or Official Receipt issued relative to the provided service

##### Qualifications of the Individual 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 leading towards the achievement of certification to ISO 9001:2015 Standard
  - For Ongoing Project/s – submit any of the following: Notice of Award, Notice to Proceed, or Contract
  - For Completed Project/s – submit Certificate of Project Completion or Official Receipt issued relative to the provided service
3. Must be an approved Third-Party Auditor by a Philippine 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 an ISO Trainer/Auditor
  - b. Submit Resume using the TPF6 Form

Minimum Requirements for the Key Personnel

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. PROJECT IMPLEMENTATION SCHEDULE**

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>	08 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>	20 – 21 March
<b>Calibration on Understanding the ISO 9001:2015 Requirements as Audit Criteria in the Conduct of Internal Quality Audit</b>  (designed for new and existing IQAs )	<b>2 days</b>	01 –02 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>2 days</b>	25 - 26 April
<b>ISO 9001:2015 Opportunity and Risk Identification, Evaluation and Control Training and Workshop</b>  (designed for New Departmental Managers, Division Chiefs and Key Process Owners	<b>2 days</b>	27 – 28 May
<b>ISO 9001:2015 Root Cause Analysis and Corrective Action Training and Workshop</b>  (designed for New Departmental Managers, Division Chiefs and Key Process Owners	<b>2 days</b>	02 – 03 May

Activity	No. of Days	Proposed Schedule
<b>C. MILESTONE ON RETOOLING ON DOCUMENT CONTROL</b>		
<b>Calibration of Document Controllers - 30 pax</b>  <i>(designed for Corporate Document Control Officer and Deputy Document Controllers)</i>	<b>1 day</b>	12 March
<b>D. FOCUS GROUP DISCUSSION AND CONSULTING (16 days)</b>		
<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, Finance, Legal, Admin, OCOO, ODCOOs)</b>  <i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i>	<b>2 days</b>	06 – 07 May
<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>  <i>(designed for concerned Departmental Managers, Division Chiefs and Key Process Owners)</i>	<b>2 days</b>	15 - 16 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, Finance, Legal, Admin, OCOO, ODCOOs)</b>  <i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i>	<b>4 days</b>	20, 21, 22, & 23 May
<b>Focus Group Discussion on the Technical Determination, Evaluation and Control of Process-Level Opportunities and Risks Using the Prescribed Relevant Forms – (IPD, DPD, MICE, MarCom, CPBD, Finance, Legal, Admin, OCOO, ODCOOs)</b>  <i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i>	<b>3 days</b>	30 May, 03 & 04 June

Activity	No. of Days	Proposed Schedule
<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, Finance, Legal, Admin, OCOO, ODCOOs)</b>  <i>(designed for Departmental Managers, Division Chiefs and Key Process Owners)</i>	<b>3 days</b>	10, 11, & 13 June
<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>	12 – 13 August
<b>E. MILESTONE ON PRE-SURVEILLANCE AUDIT</b>		
<b>Pre-Recertification Audit</b>	<b>10 man-days</b>	15 – 19 July
<i>Note: The 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.</i>		

## VII. CONTRACT DURATION

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 2024.

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

The ABC is **NINE HUNDRED NINETY-EIGHT THOUSAND PESOS ONLY (Php998,000.00)** inclusive of all applicable fees and taxes.

## IX. TERMS OF PAYMENT

Payment	Deliverables
<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>	
22% of the ABC	Upon conduct of the training and workshops on: <ol style="list-style-type: none"> <li>1. Effective Internal Auditing ISO 9001:2015 QMS Based on ISO 19011:2018 Training and Workshop</li> <li>2. Calibration on Understanding the ISO 9001:2015 Requirements as Audit Criteria in the Conduct of Internal Quality Audit</li> <li>3. Calibration of Internal Quality Auditors on Technical Writing of IQA Findings and Preparation of IQA Reports</li> </ol>

	<ol style="list-style-type: none"> <li>4. ISO 9001:2015 Opportunity and Risk Identification, Evaluation and Control Training and Workshop</li> <li>5. ISO 9001:2015 Root Cause Analysis and Corrective Action Training and Workshop</li> </ol>
<b>C. MILESTONE ON RETOOLING ON DOCUMENT CONTROL</b>	
4% of the ABC	Upon conduct of the Calibration of Document Controllers
<b>D. FOCUS GROUP DISCUSSION AND CONSULTING</b>	
50% of the ABC	<p>Upon conduct of Focus Group Discussions and Consulting (25 days):</p> <ol style="list-style-type: none"> <li>1. 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>2. Technical Review and Update of TPB’s System Procedures (SPMs), Forms, Allowed Permanent Process Changes and Opportunity/Risk Rating Schemes</li> <li>3. Technical Review and Update of Relevant Quality Operating Procedures (QOPs), Forms and Allowed Permanent Process Changes – Per Department</li> <li>4. Technical Determination, Evaluation and Control of Organizational and Process-Level Opportunities and Risks Using the Prescribed Relevant Forms</li> <li>5. 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>6. 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-Recertification 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:

Proposal	Weight (%)
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%)		
	With at least 5 more government agencies (8%)		

	<b>PARTICULARS</b>		<b>%</b>	<b>RATING</b>
		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>

Passing Score: 85%

#### **X. PROJECT OFFICER'S CONTACT INFORMATION**

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