

STATEMENT OF COMPLIANCE TO THE TERMS OF REFERENCE

CONSULTANCY SERVICES TO PROVIDE FACILITATION OF TRAINING, WORKSHOPS, AND COACHING FOR THE QUALITY MANAGEMENT SYSTEM (QMS) PLANNING SESSIONS FOR CY 2024 AND CY 2025 OF THE TOURISM PROMOTIONS BOARD

Bidders must state here either “Comply”, “Not Comply” or “Not applicable” against each of the individual parameters of each Specification stating the corresponding performance parameter of the equipment offered. **Statements of “Comply” or “Not Comply” must be supported by evidence in a Bidder Bid and cross-referenced to that evidence. A statement that is not supported by evidence or is subsequently found to be contradicted by the evidence presented will render the Bid under evaluation liable for rejection. A statement either in the Bidder's statement of compliance or the supporting evidence that is found to be false either during Bid evaluation may be regarded as fraudulent and render the Bidder or supplier liable for prosecution subject to the applicable laws and issuances.**

| ITEM NO. | SPECIFICATION | STATEMENT OF COMPLIANCE |
|----------|---|-------------------------|
| 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. | |
| 8. | Produce one (1) Final Engagement Report covering the proceedings of the planning events including 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”; all activities indicated in this Terma of Reference shall likewise be covered in the Final Engagement Report. | |
| 9. | Provide training workshop materials as may be necessary. | |
| 10. | <p>I. Qualification of the Consultancy Company/Firm</p> <p>The Company/Firm must be a Filipino or a Filipino-owned and registered company in the Philippines engaged in providing services for training facilitation or similar engagements for the last five (5) years.</p> | |

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| 11. | The Company/Firm 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. | | | | | | | | | | | |
|------------------------|---|----------------|--------------------------------------|------------------------|---|------------------------|---|-----------------|-----------------|---------------------|-----------------|--|
| 12. | The Company/Firm must have actively engaged in rendering services for consultancy work [within the past two (2) years] and have rendered services involving marketing and promotions and for services related to TPB's mandate [at a minimum of one (1) year engagement. | | | | | | | | | | | |
| 13. | <p>All key personnel of the Company/Firm to be assigned to the project shall have:</p> <ul style="list-style-type: none"> • Must have relevant work experience in conducting and facilitating planning workshops and interventions in the private and government sectors, and • Must have 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/Major Final Outputs or Annual Planning • The relevant work experience and extensive working knowledge shall be as follows: <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="text-align: center;">Key Personnel</th> <th style="text-align: center;">Minimum Years of Relevant Experience</th> </tr> </thead> <tbody> <tr> <td>Lead Facilitator/s</td> <td>five (5) years</td> </tr> <tr> <td>Subject Matter Experts</td> <td>three (3) years</td> </tr> <tr> <td>Project Manager</td> <td>three (3) years</td> </tr> <tr> <td>Admin/Support Staff</td> <td>three (3) years</td> </tr> </tbody> </table> | Key Personnel | Minimum Years of Relevant Experience | Lead Facilitator/s | five (5) years | Subject Matter Experts | three (3) years | Project Manager | three (3) years | Admin/Support Staff | three (3) years | |
| Key Personnel | Minimum Years of Relevant Experience | | | | | | | | | | | |
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| 14. | <p>Further, the Subject Matter Expert/s shall preferably has/have</p> <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="text-align: center;">Subject Matter</th> <th style="text-align: center;">SME Qualification</th> </tr> </thead> <tbody> <tr> <td>Performance Management</td> <td>Certified Performance Management Professional</td> </tr> <tr> <td>Risk Management</td> <td>Established familiarity with ISO 31000 Risk Management Guidelines</td> </tr> </tbody> </table> <p>qualifications as follows:</p> | Subject Matter | SME Qualification | Performance Management | Certified Performance Management Professional | Risk Management | Established familiarity with ISO 31000 Risk Management Guidelines | | | | | |
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| 15. | <p>II. Qualification of the Individual Consultant</p> <p>The Individual Consultant must be a Filipino engaged in providing services for training facilitation or similar engagements for the last five (5) years;</p> | | | | | | | | | | | |
| 16. | The individual Consultant 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; | | | | | | | | | | | |

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| 17. | The Individual Consultant must have actively engaged in rendering services for consultancy work [within the past two (2) years] and have rendered services involving marketing and promotions and for services related to TPB’s mandate [at a minimum of one (1) year engagement. | | | | | | | | | | | | | | | | |
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| 18. | <p>The Individual Consultant shall have qualifications as follows:</p> <ul style="list-style-type: none"> • Must have a minimum of five (5) years relevant work experience in conducting and facilitating planning workshops and interventions in the private and government sectors; • Must have 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/Major Final Outputs or Annual Planning; • Must be a certified management professional • Must have familiarity with Risk 31000 Risk Management Guidelines | | | | | | | | | | | | | | | | |
| 19. | <p>SCOPE OF SERVICES/OUTPUTS AND DELIVERABLES WITH INDICATIVE SCHEDULE:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center;">Activity</th> <th style="text-align: center;">No. of Days</th> <th style="text-align: center;"><u>Indicative Schedule</u></th> </tr> </thead> <tbody> <tr style="background-color: #d9ead3;"> <td colspan="3">A. MILESTONE ON THE CORPORATE RISK ASSESSMENT WORKSHOP AND DATA CAPTURE TOOL</td> </tr> <tr> <td>1 Conduct of Corporate Risk Assessment Workshop to include Environmental Scanning (Corporate SWOT Analysis), Stakeholder Analysis, Strategic Risk Register and attendant Risk Control Plan and TPB IP-RNEs Matrix and a revisit/ updating of the Management of Change Matrix with resulting <u>outputs</u></td> <td style="vertical-align: top;">3 days (including a 1-day count for consolidation and finalization of outputs and recommendations)</td> <td style="vertical-align: top;">within June 2024</td> </tr> <tr> <td>2 Data Capture Form to assist in the monitoring of corporate performance for use of the CPBD Department as part of its <u>risk based</u> thinking approach</td> <td></td> <td></td> </tr> <tr> <td colspan="3"><i>with Facilitator-Coach Post Report</i></td> </tr> </tbody> </table> | Activity | No. of Days | <u>Indicative Schedule</u> | A. MILESTONE ON THE CORPORATE RISK ASSESSMENT WORKSHOP AND DATA CAPTURE TOOL | | | 1 Conduct of Corporate Risk Assessment Workshop to include Environmental Scanning (Corporate SWOT Analysis), Stakeholder Analysis, Strategic Risk Register and attendant Risk Control Plan and TPB IP-RNEs Matrix and a revisit/ updating of the Management of Change Matrix with resulting <u>outputs</u> | 3 days (including a 1-day count for consolidation and finalization of outputs and recommendations) | within June 2024 | 2 Data Capture Form to assist in the monitoring of corporate performance for use of the CPBD Department as part of its <u>risk based</u> thinking approach | | | <i>with Facilitator-Coach Post Report</i> | | | |
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| 20. | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #d9ead3;"> <th colspan="3">B. MILESTONE ON THE STRATEGIC PLANNING POCKET SESSIONS FOR CY 2025</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Conduct and facilitation of preparatory pocket meetings in view of the Mid-year Strategic Planning for CY 2025, with in session coaching incorporated in the FGDs, to pre-identify constraints and issues and refine projected CY 2024 and CY 2025 budget <u>implications</u>, staffing requirements, etc.)</td> <td style="vertical-align: top;">4 days (the 2-day face-to-face sessions may be converted to FGD sessions at a later date if the schedules <u>pre mid-year</u> planning is not workable)</td> <td style="vertical-align: top;">within June 2024 <ul style="list-style-type: none"> • 1-day prework • 2-days face-to-face (5 and 6 June) • 1-day post work </td> </tr> <tr> <td colspan="3"><i>with Facilitator-Coach Post Report</i></td> </tr> </tbody> </table> | B. MILESTONE ON THE STRATEGIC PLANNING POCKET SESSIONS FOR CY 2025 | | | Conduct and facilitation of preparatory pocket meetings in view of the Mid-year Strategic Planning for CY 2025, with in session coaching incorporated in the FGDs, to pre-identify constraints and issues and refine projected CY 2024 and CY 2025 budget <u>implications</u> , staffing requirements, etc.) | 4 days (the 2-day face-to-face sessions may be converted to FGD sessions at a later date if the schedules <u>pre mid-year</u> planning is not workable) | within June 2024 <ul style="list-style-type: none"> • 1-day prework • 2-days face-to-face (5 and 6 June) • 1-day post work | <i>with Facilitator-Coach Post Report</i> | | | | | | | | | |
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| 21. | <p>C. MILESTONE ON THE STRATEGIC PLANNING FOR CY 2025</p> <p>Strategic Planning for CY 2025</p> <ol style="list-style-type: none"> 1 Review TPB's Performance as of Q2 2024, PES Results and implementation to-date of PPAs against Targets 2 Revisit 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 Review of the TPB Strategy Map and formulation of the Performance Scorecard, including the strategic objectives, strategic <u>measures</u> and targets for CY 2025 5 Preparation-formulation of 2025 Strategic Initiatives (clustered by mandate 1, 2, 3) 6 Consolidation and Ways Forward <p><i>with Facilitator-Coach Post Event Engagement Synthesis Report</i></p> | 4 days | 18-21 June 2024 | |
| 22. | <p>D. MILESTONE ON THE CPBD PERFORMANCE MANAGEMENT WRITESHOP AND PLANNING AND TRAINING WORKSHOP FOR CY 2025</p> <ul style="list-style-type: none"> • First Leg: CPBD Performance Management Writeshop for CY 2025 Geared towards the production of the draft Consolidated Performance Targets and Rating Guide for CY 2025 (OPCRs, DPCR, IPCRs) • Second Leg: CPBD PLANNING WORKSHOPS FOR CY 2025 Geared towards establishing an effective performance monitoring and reporting system preparatory to automating TPB's internal PES and SPMS by CY 2025 and to facilitate planning competencies enhancement and the finalization of CPBD's PPAs for CY 2025 • Third Leg: CALIBRATION SESSIONS WITH THE PERFORMANCE SCORECARD FOCALS FOR CY 2024 <i>with Facilitator-Coach Post Report</i> | 3x 2-day sessions (interchangeable Leg order and dates) | within Q4 2024 | |
| 23. | <p>E. MILESTONE ON THE TPB PERFORMANCE MANAGEMENT CALIBRATION POCKET WORKSHOPS AND QMS PERFORMANCE FGD SESSIONS</p> <ul style="list-style-type: none"> • TPB Project Planning and Management Refresher Course • TPB Performance Management Calibration Pocket Meetings • QMS Performance FGD Sessions <p>Geared towards the finalization of the Summary of Consolidated Performance Targets and Rating Guide for CY 2024 (OPCRs, DPCR, IPCRs)</p> <p><i>with Facilitator-Coach Post Report</i></p> | 3x 2-day sessions (2-days for the refresher course, 2-days for the pocket meetings, 2-days for the FGDs) | within Q4 2024 | |

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| 24. | <p>F. MILESTONE ON THE TPB YEAR-END OPERATIONAL PLANNING FOR CI 2025</p> <ul style="list-style-type: none"> • Performance Validation for CY 2024 • Strategic Planning for 2025 <p>1 2024 Performance Assessment Performance (PES Results and implemented PPA reports)</p> <p>2 Cluster presentation of the strategic and operational plans for CY 2025 based on the finalized Performance Targets for CY 2025 resulting from the TPB Performance Management Calibration Pocket Meetings</p> <p>3 Critiquing by the COO and MANCOM</p> <p>4 Sealing of the TPB Commitments vis-à-vis the PES Targets for CY 2025</p> <p><i>with Facilitator-Coach Post Event Engagement Synthesis Report</i></p> | 4-days | within November/ December 2024 | |
| 25. | <p>Note: The proposed activities and time frames may be adjusted subject to the recommendations of the service provider and the approval of TPB.</p> | | | |
| 26. | <p>DURATION OF ENGAGEMENT</p> <p>The engagement of the Facilitator-Coach for the QMS Planning Sessions of TPB for CY 2024 and 2025 will start from the date of acceptance of the Notice to Proceed (NTP) until 31 December 2024.</p> | | | |
| 27. | <p>TPB RESPONSIBILITIES:</p> <ul style="list-style-type: none"> -Coordinate the pre-work required prior to the event; -Provide the necessary documents and materials needed by the Consultant; -Invite and ensure the attendance of the targeted participants; -Provide when needed the accommodation, venue, and meals of the participants for the duration of the workshops; -Provide when needed the accommodation and meals of the Facilitator-Coach and support team (maximum 4 persons) for the duration of the workshops; -Provide the external provider’s team with a working area in TPB during visit (as applicable) -Provide training equipment, such as LCD projector, projector screen, microphones, speaker, flip chart stands and whiteboard and other materials required by the Consultant are available for use during the workshops (as applicable); | | | |
| 28. | <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> | | | |

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| | The indicative payment scheme is as follows: | | |
| | DELIVERABLES: Outputs/Milestones | Payments | |
| | Tranche 1 | | |
| | Upon satisfactory conduct and completion of the: <ul style="list-style-type: none"> • CORPORATE RISK ASSESSMENT WORKSHOP AND DATA CAPTURE TOOL with post-report <ul style="list-style-type: none"> o TPB Corporate SWOT Analysis o Stakeholder Analysis o Strategic Risk Register and attendant Risk Control Plan o TPB IP-RNEs Matrix | | |
| | <ul style="list-style-type: none"> o Updated Management of Change Matrix o Data Capture Tool Form • STRATEGIC PLANNING POCKET SESSIONS FOR CY 2025 with post-report <ul style="list-style-type: none"> o Non-consolidated preliminary PPA line-up for CY 2024 o Identified constraints, issues and refinement applications • STRATEGIC PLANNING FOR CY 2025 with post engagement synthesis report <ul style="list-style-type: none"> o CY 2024 Reprogramming/Catch-up Plans (only as applicable) o Draft TPB Performance Evaluation Scorecard (PES) for CY 2025 o TPB Strategic Initiatives for CY 2025 | Forty percent of the Contract Price (40%) | |
| | Tranche 2 | | |
| 29. | Upon satisfactory conduct and completion of the: <ul style="list-style-type: none"> • CPBD PERFORMANCE MANAGEMENT WRITESHOP FOR CY 2025 with post report <ul style="list-style-type: none"> o Draft Summary of Consolidated Performance Targets and Rating Guide for CY 2025 (OPCRs, DPCR, IPCRs) • <u>CPBD PLANNING</u> WORKSHOPS FOR CY 2025 with post report <ul style="list-style-type: none"> o Draft CPBD's PPAs for CY 2024 • <u>CPBD PLANNING</u> WORKSHOPS FOR CY 2025 with post report <ul style="list-style-type: none"> o Design of a monitoring and reporting template/system adoptable to an automated system (PES and SPMS) o Draft CPBD's PPAs for CY 2024 • TPB PROJECT PLANNING AND MANAGEMENT REFRESHER COURSE with post report <ul style="list-style-type: none"> o Refresher course on focusing on the big picture, data driven planning and reporting by numbers • TPB PERFORMANCE MANAGEMENT CALIBRATION POCKET WORKSHOPS with post report <ul style="list-style-type: none"> o Draft calibrated and vetted Summary of Consolidated Performance Targets and Rating Guide for CY 2025 (OPCRs, DPCR, IPCRs) • QMS PERFORMANCE FGD SESSIONS with post report <ul style="list-style-type: none"> o Open consultative sessions for TPB MANCOM officers and key staff | Thirty percent of the Contract Price (30%) | |
| | Tranche 3 | | |
| | Upon satisfactory conduct and completion of the: <ul style="list-style-type: none"> • TPB OPERATIONAL PLANNING FOR CY 2025 with post engagement synthesis report | Thirty percent of the Contract Price (30%) | |

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| 30. | Invitation to Suppliers: The Service Provider is expected to submit technical and financial proposals which shall include: <ul style="list-style-type: none">•A brief profile and description demonstrating the professional/company qualification indicated in item V; | |
| 31. | <ul style="list-style-type: none">•Curriculum vitae of key personnel who will be assigned in the projects showing competency, experience and areas of specialization using the TPF6 Form; | |
| 32. | <ul style="list-style-type: none">•List and evidence of relevant work experience for the last five (5) years (2017-2022 timeline); | |
| 33. | <ul style="list-style-type: none">•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. | |

NAME AND SIGNATURE OF AUTHORIZED REPRESENTATIVE / DATE