

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

I. PROJECT

The Tourism Promotions Board (TPB) is seeking a competent and experienced Quality Management System (QMS) Consultant or Consulting Firm that can provide facilitator and coaching technical services for TPB's strategic and operational planning activities, for CY 2024 and CY 2025, as part of effectively and efficiently delivering its mandate as provided under Republic Act No. 9593 or the Tourism Act of 2009.

The Consultant shall also guide the Corporate Planning and Business Development (CPBD) Department towards improving its competencies on planning, programming, monitoring and evaluation, and strengthened monitoring and reporting system for TPB.

II. BACKGROUND

An attached agency of the Department of Tourism, TPB exists to market and promote the Philippines domestically and internationally as a world-class tourism and MICE destination, in strategic partnership with private and public stakeholders to deliver a unique high-value experience for visitors, significantly contributing to increased arrivals, receipts and investments to the country.

The TPB conducts QMS Planning Sessions/Workshops to establish the Corporate and Functional Quality Objectives for the following Fiscal Year in accordance with the organizational goals, objectives and strategic direction. The Corporate targets are expressed in the Performance Scorecard and Expenditure Program required by the Governance Commission for GOCCs (GCG) and Department of Budget and Management (DBM), respectively. Towards this end, TPB seeks to engage the services of an external provider to facilitate-coach its Quality Management System (QMS) Planning Events for CY 2024 and CY 2025.

III. OBJECTIVES

The hiring of a QMS facilitator-coach shall guide TPB in:

1. Ensuring a harmonized approach to the agreed upon outputs and deliverables for the Strategic and Operational Planning this CY 2024 including effective implementation of planning sessions/workshop activities and trainings as indicated in this Terms of Reference.
2. Enhancing the competency and capability of TPB's Corporate Planning and

Business Development Department in conducting strategic and corporate planning sessions, performance monitoring and reporting and in the evaluation of programs, projects and activities being implemented by the Corporation

IV. SCOPE OF SERVICES

The said consulting services shall involve the following activities:

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 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.

V. QUALIFICATIONS

I. Qualification of the Consultancy Company/Firm

1. 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.

2. 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.
3. 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.
4. All key personnel of the Company/Firm to be assigned to the project shall have:
 - 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:

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

5. 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

II. Qualification of the Individual Consultant

1. The Individual Consultant must be a Filipino engaged in providing services for training facilitation or similar engagements for the last five (5) years;
2. 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;

3. 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.
4. The Individual Consultant shall have qualifications as follows:
 - 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

VI. SCOPE OF SERVICES/OUTPUTS AND DELIVERABLES WITH INDICATIVE SCHEDULE:

Activity	No. of Days	Indicative Schedule
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 outputs 2 Data Capture Form to assist in the monitoring of corporate performance for use of the CPBD Department as part of its risk based thinking approach <u>with Facilitator-Coach Post Report</u>	3 days (including a 1-day count for consolidation and finalization of outputs and recommendations)	within June 2024

B. MILESTONE ON THE STRATEGIC PLANNING POCKET SESSIONS FOR CY 2025		
<p>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 implications, staffing requirements, etc.)</p> <p><i>with Facilitator-Coach Post Report</i></p>	<p>4 days (the 2-day face-to-face sessions may be converted to FGD sessions at a later date if the schedules pre mid-year planning is not workable)</p>	<p>within June 2024</p> <ul style="list-style-type: none"> • 1-day prework • 2-days face-to-face (5 and 6 June) • 1-day post work

C. MILESTONE ON THE STRATEGIC PLANNING FOR CY 2025		
<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 measures 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</i> <i>Engagement Synthesis Report</i></p>	<p>4 days</p>	<p>18-21 June 2024</p>

D. MILESTONE ON THE CPBD PERFORMANCE MANAGEMENT WRITESHOP AND PLANNING AND TRAINING WORKSHOP FOR CY 2025

<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, DPCRs, 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 <u>with Facilitator-Coach Post Report</u> 	<p>3x 2-day sessions (interchangeable Leg order and dates)</p>	<p>within Q4 2024</p>
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E. MILESTONE ON THE TPB PERFORMANCE MANAGEMENT CALIBRATION POCKET WORKSHOPS AND QMS PERFORMANCE FGD SESSIONS

<ul style="list-style-type: none"> • TPB Project Planning and Management Refresher Course • TPB Performance Management Calibration Pocket Meetings • QMS Performance FGD Sessions Geared towards the finalization of the Summary of Consolidated Performance Targets and Rating Guide for CY 2024 (OPCRs, DPCRs, IPCRs) <p><u>with Facilitator-Coach Post Report</u></p>	<p>3x 2-day sessions (2-days for the refresher course, 2-days for the pocket meetings, 2-days for the FGDs)</p>	<p>within Q4 2024</p>
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F. MILESTONE ON THE TPB YEAR-END OPERATIONAL PLANNING FOR CI 2025		
<ul style="list-style-type: none"> • Performance Validation for CY 2024 • Strategic Planning for 2025 <ol style="list-style-type: none"> 1 2024 Performance Assessment Performance (PES Results and implemented PPA reports) 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 3 Critiquing by the COO and MANCOM 4 Sealing of the TPB Commitments vis-à-vis the PES Targets for CY 2025 <p><u>with Facilitator-Coach Post Event Engagement Synthesis Report</u></p>	<p>4-days</p>	<p>within November/ December 2024</p>

Note: The proposed activities and time frames may be adjusted subject to the recommendations of the service provider and the approval of TPB.

VII. DURATION OF ENGAGEMENT

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.

VIII. TPB RESPONSIBILITIES:

1. Coordinate the pre-work required prior to the event;
2. Provide the necessary documents and materials needed by the Consultant;
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. Provide the external provider’s team with a working area in TPB during visit (as applicable)
7. 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);

IX. APPROVED BUDGET FOR THE CONTRACT (ABC)

ONE MILLION PESOS ONLY (PhP 1,000,000.00) inclusive of all applicable fees and taxes)

X. TERMS OF PAYMENT

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.

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.

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	

<p>Upon satisfactory conduct and completion of the:</p> <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, DPCRs, IPCRs) • CPBD PLANNING WORKSHOPS FOR CY 2025 with post report <ul style="list-style-type: none"> o Draft CPBD's PPAs for CY 2024 • CPBD PLANNING 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, DPCRs, 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 	<p>Thirty percent of the Contract Price (30%)</p>
<p>Tranche 3</p>	
<p>Upon satisfactory conduct and completion of the:</p> <ul style="list-style-type: none"> • TPB OPERATIONAL PLANNING FOR CY 2025 with post engagement synthesis report 	<p>Thirty percent of the Contract Price (30%)</p>

XI. Invitation to Suppliers:

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

- 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.

PROJECT OFFICER/CONTACT PERSON:

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Pursuant to section 33.2.2. of R.A. 9184 or the Government Procurement Reform Act, the technical and financial proposal of the shortlisted bidders will be evaluated using the Quality Cost-Based Evaluation (QCBE). An 85%-15% quality to cost ratio evaluation of the technical proposal of the Service Provider/Supplier and a **hurdle rate of 85%** shall apply based on the following criteria and corresponding numerical weights:

Evaluation Criteria	Weight
Technical Proposal	85%
Applicable Experience as part of the basis for evaluation (25 pts)	
Quality of project personnel (30 pts)	
<u>Firm</u> : Suitability of proponent/key staff to perform the project's scope of work, general qualifications and competence including the relevant experience of the proponent/key staff	
<u>Individual Consultant</u> : Combined minimum work experience and working knowledge required of the lead and key personnel comparative of a Firm's requirement [minimum eight (8) years of relevant experience]	
Plan of approach and methodology, i.e. clarity, feasibility, innovativeness, and comprehensiveness of the proposal (45 pts)	15%
Financial Proposal (100 pts)	15%
Total	100%