

## TERMS OF REFERENCE

- I. **BIDDER** : Market Research and Consulting Services
- II. **PROJECT TITLE** : Development of Modules and Sites for Life-long Experiences Through Voluntourism Learning
- III. **PROJECT IMPLEMENTATION** : September 2023 to February 2024

### IV. **BACKGROUND**

Promoting lifelong learning is instrumental to achieving sustainable development. As an expansion of capabilities and experiences, lifelong learning can facilitate the appreciation of new ideas and fresh views for inventing the future. With enough people sharing ideas and values, lifelong opportunities can be instrumental to driving collective action and building a thriving and flourishing society.

Volunteer tourism or voluntourism programs can be characterized in terms of engagement, tourist activities, and volunteer work. With volunteer work as an opportunity for lifelong learning, a well-designed voluntourism program can create situations for generative learning and facilitate lifelong learning.

With the ease of travel restrictions and the interest in transformative travel experiences, voluntourism as a lifelong learning activity can become a significant travel offering for tourists who seek meaningful engagements outside their homes. To make the most of this opportunity, communities must be prepared so they can collaborate with voluntourism organizations and become part of this movement.

### V. **OBJECTIVES**

- To develop learning modules and organize workshops to build the capacity of selected destination communities to develop Voluntourism Programs that provide Lifelong Learning activities; and
- To develop participating destination communities to become pilot sites that can be featured by DOT as model voluntourism sites that offer lifelong learning opportunities to visitors.

### VI. **MINIMUM REQUIREMENTS FOR SUPPLIERS**

- Must be a market research and/or consulting agency that specializes in the conduct of custom research for local organizations; and
- Must be registered with the Philippine Government Electronic Procurement Systems (PhilGEPS).

### VII. **SCOPE AND DELIVERABLES**

This project requires a team to develop and implement the learning modules and organize workshops and sessions to build the capacity of selected destination communities to develop Voluntourism Programs that provide Lifelong Learning activities. The participating destination communities are expected to become pilot sites that can be featured by DOT as model voluntourism sites that offer lifelong learning opportunities to visitors.

The Workshop shall comprise teaching materials, and development and mentoring sessions to equip participants with practical information to prepare voluntourism programs that offer lifelong learning opportunities. The materials and sessions should provide inputs to allow the participants to develop programs consistent with the following voluntourism thematic areas:

- Volontourism for Resilient Communities
- Heritage Conservation through Volontourism
- Environmental Conservation through Volontourism
- Sustainable Farming through Volontourism

Nine (9) community groups from different destinations will be selected as participants in the community workshop. Emerging destinations or sites that do not have an existing volontourism program will be prioritized. At least one (1) group must be trained under each volontourism thematic area.

A community group shall be composed of the following:

- At least one (1) community-based organization or association willing to host volontourism programs in the next 12 to 24 months;
- The local tourism office where the organization/association is located; and
- May include a tour operator or business enterprise as the organization/association's partner in organizing the volontourism programs.

The community groups must come from three (3) Regions in the country that can safely accommodate tourists in 2024:

Region	No. of Communities
Cordillera Administrative Region (CAR)	3
Region VII – Central Visayas	3
Region XIII – Caraga	3

At the end of the Workshop, DOT expects at least five (5) of the nine (9) community groups to complete the training session and produce a volontourism program that DOT can offer to volontourism-sending organizations and stakeholders interested in becoming part of volontourism in the Philippines.

At the end of the workshop, the Team is expected to prepare feature articles on the experience of each successful group. The write-up and the Brand to be developed by the Team will be used as materials to promote volontourism as a travel offering to volontourism stakeholders and models that interested local government units (LGUs) can replicate.

#### A. SCOPE OF WORK

The Team should be able to conduct or implement the following activities:

Activities	Description
Formulation of Screening Activity Design and Documents	These are the instruments, forms, screening criteria and processes to determine the readiness of community groups who wish to participate in the community workshops. The Screening Activity Design should be a tool that DOT and LGUs can use to determine the readiness of groups and sites to host volontourism programs in a destination. The Screening Activity Design shall be implemented to determine the community

	groups participating in the training sessions.
Formulation of Learning Modules	<p>The Learning Modules are learning materials to be used to equip community groups so that they can formulate and design their voluntourism programs. The learning materials must include the target learning outcomes, reference materials, learners' handouts, and recorded lectures to be used by the Team to capacitate and mentor the participating community groups.</p> <p>The Learning Modules should equip the participants with the knowledge to organize voluntourism programs that offer (1) guided lifelong learning activities and (2) voluntourism activities consistent with the four (4) identified voluntourism thematic areas.</p> <p>Moreover, the Learning Modules shall be based on the Voluntourism Model and Action Plan from the conducted DOT Voluntourism Research Project. The Learning Modules should include the following topics, and among others:</p> <ol style="list-style-type: none"> <li>1. Voluntourism in the Philippines and Southeast Asia;</li> <li>2. Developing the Voluntourism Program (Separate modules should be developed for each voluntourism thematic area);</li> <li>3. Packaging, Pricing, and Promoting the Voluntourism Program;</li> <li>4. Visitor Management for Voluntourism (Separate modules should be developed for each voluntourism thematic area);</li> <li>5. Facilitating Learning through Voluntourism (Separate modules should be developed for each voluntourism thematic area;)</li> <li>6. Organizing and Preparing the Community to host the Voluntourism Program;</li> <li>7. Monitoring Quality and Meeting Program Outcomes (Separate modules should be developed for each voluntourism thematic area);</li> </ol>

	The Learning Modules should be prepared considering their usefulness as a resource for LGUs and organizations who want to organize voluntourism as part of their future tourism offerings.
Conduct of one (1) Teaching Session per group	The Teaching Session will include an Orientation and Presentation of the learning modules produced by the Team to the participating groups. The teaching session may be done virtually and with more than one (1) community group as participants
Conduct of one (1) on-site workshop per region	The Workshop serves as a mentoring session to help the participant enhance their program and facilitate the roll-out of the proposed voluntourism program. The Workshop shall also include site visits to the area where the proposed voluntourism activities will be implemented to determine feasibility. Three (3) representatives from the DOT OPMD Education Tourism and/or other DOT-authorized representatives will join the research team in all nine (9) site visits. The total number of days for the workshop and site visit is at least six (6) days per region. This includes the transportation arrangement (land and air travel) of the DOT Representatives.
Conduct of at least one (1) coaching session per group	The coaching session serves as a mentoring session to allow each group to present their program in a forum that will be participated in by volunteer service organizations (VSOs), travel agencies, educational institutions, and other voluntourism organizers. The coaching session may be done virtually.
Provision of a Training Evaluation Tool	The tool should help DOT and the host LGU document and analyze the performance of Community Groups so they can improve their output.
Formulation of Monitoring and Evaluation for the pilot voluntourism sites and programs	A tool that collects data to assess the effectiveness of programs, identify other areas for improvement and enhance the impact of intervention to improve the developed sites and programs. These tools include key performance indicators, dashboards, checklist and monitoring plans.
Formulation of a Voluntourism Brand for the pilot voluntourism sites and programs	The Voluntourism Brand includes the proposed branding for voluntourism in the Philippines consistent with the new DOT

	branding and brand symbols that can be used to label DOT-recognized voluntourism programs. The Brand shall be a promotional tool that DOT can use to promote the pilot sites and future voluntourism programs. The DOT shall use the Voluntourism Brand when referring to voluntourism as tour products. It should capture the essence of voluntourism and lifelong learning offered by the pilot sites
Production of feature articles with site images for each group that will fulfill the voluntourism training requirements satisfactorily	The articles shall serve as information and educational materials to promote voluntourism as a travel offering for LGUs and voluntourism stakeholders interested in partnering with community groups
Formulation of a Marketing Communication Plan and Promotional Event Concept to introduce the pilot voluntourism sites, future voluntourism areas identified by DOT, and emerging voluntourism sites	The Plan and Event Concept will guide DOT in organizing marketing and promotional activities on voluntourism
Compilation of Learning Handbooks and Feature Articles	The material shall be print /distribution ready, so the DOT can disseminate these to LGUs who wish to host voluntourism.
Submission of an Inception Report and two (2) progress reports	
Submission of one (1) final report	To describe the community workshop series and the deliverables produced by the Team
Submission of other potential provinces as a voluntourism destination	The team is also expected to prepare and submit the list of other provinces that can be developed as voluntourism destinations

## B. SCHEDULE AND DELIVERABLES

The deliverables should be completed as follows:

Month	Project Team Activities	Client and other Stakeholder Activities
Month 1	<ul style="list-style-type: none"> <li>• Submission of Inception Report. The report must include the following: <ul style="list-style-type: none"> <li>○ Project Methodology</li> <li>○ Overview of Learning Modules</li> <li>○ Screening Activity Design and Documents to determine participating groups</li> </ul> </li> <li>• Preparation of draft Learning Modules</li> </ul>	<ul style="list-style-type: none"> <li>• DOT sends invitations to Regional Offices</li> <li>• DOT Regional Offices nominate Community Groups to be part of the program</li> </ul>
Month 2	<ul style="list-style-type: none"> <li>• Submission of draft Learning Modules to DOT</li> </ul>	<ul style="list-style-type: none"> <li>• DOT evaluates and approves the Learning Modules</li> </ul>

	<ul style="list-style-type: none"> <li>• Submission of enhanced Learning Modules to DOT</li> </ul>	
Month 3	<ul style="list-style-type: none"> <li>• Conduct Teaching Sessions and On-site Workshops</li> <li>• Submission of Progress Report 1</li> </ul>	<ul style="list-style-type: none"> <li>• DOT and Community groups participate in teaching and workshop sessions</li> </ul>
Month 4	<ul style="list-style-type: none"> <li>• Conduct of Coaching Sessions</li> <li>• Preparation of draft Feature Articles and proposed Voluntourism Brand</li> <li>• Submission of draft Marketing Communication Plan and Promotion Event Concept</li> <li>• Submission of Progress Report 2</li> </ul>	<ul style="list-style-type: none"> <li>• DOT reviews and approves Feature Articles and Voluntourism Brand</li> <li>• DOT reviews and approves the draft Marketing Communication Plan and Promotion Event Concept</li> </ul>
Month 5	<ul style="list-style-type: none"> <li>• Submission of final Feature Articles</li> <li>• Submission of approved Voluntourism Brand</li> <li>• Submission of approved Marketing Communication Plan and Promotion Event Concept</li> </ul>	
Month 6	<ul style="list-style-type: none"> <li>• Presentation and Submission of the Final report</li> </ul>	

**VIII. REQUIRED PERSONNEL**

<b>REQUIRED PERSONNEL</b>	<b>MINIMUM YEARS OF EXPERIENCE</b>
<p>Team Leader</p> <ul style="list-style-type: none"> <li>• Has extensive teaching experience (at least ten (10) years) in tourism</li> <li>• Has Masters degree</li> <li>• Has extensive experience as a trainer/mentor of organizations and LGUs</li> <li>• Has extensive experience (at least five (5) years) in Disaster or Crisis Management, Community Development, or related fields</li> <li>• Has research experience in voluntourism</li> </ul>	Ten (10) years
<p>Travel and Marketing Professional</p> <ul style="list-style-type: none"> <li>• Will lead the formulation of the Marketing Communication Plan and Promotional Event on voluntourism</li> <li>• Shall produce the pertinent voluntourism learning modules and serve as a resource person on pertinent topics during the teaching and coaching sessions</li> <li>• Has extensive experience (at least five (5) years) in Tourism Marketing and/or Tour Product Development</li> <li>• Has an advanced degree (Masters degree)</li> <li>• Has experience in organizing and conducting tourism and community training programs</li> </ul>	Five (5) years

<p>Culture and Heritage Conservation Expert</p> <ul style="list-style-type: none"> <li>• Shall produce the pertinent voluntourism learning modules and serve as a resource person on pertinent topics during the teaching and coaching sessions</li> <li>• Has extensive experience (at least five (5) years) as Cultural Worker, Heritage Researcher, or related professions</li> <li>• Has an advanced degree (Masters degree)</li> <li>• Has experience in organizing and conducting training programs</li> </ul>	<p>Five (5) years</p>
<p>Environmental Science Expert</p> <ul style="list-style-type: none"> <li>• Shall produce the pertinent voluntourism learning modules and serve as a resource person on pertinent topics during the teaching and coaching sessions</li> <li>• Has extensive experience (at least five years) in Marine Science, Environmental Science, Fisheries, or related fields</li> <li>• Has an advanced degree (at least Masters)</li> <li>• Has experience in organizing and conducting training programs</li> </ul>	<p>Five (5) years</p>
<p>Graphics Artist and Media Producer</p> <ul style="list-style-type: none"> <li>• Shall prepare Layout and Graphics Design of Learning Modules, Presentations (i.e., MS Powerpoint, Handouts, Zoom backgrounds), Brand symbols and ebooks</li> <li>• Shall facilitate the production of recorded lectures (edited Zoom recordings)</li> <li>• Will produce the layout of Feature Articles, with images and Cover Page</li> <li>• Will produce the Brand Symbols and sample applications for voluntourism</li> <li>• Has the ability to implement creative projects related to campaign development, art direction, contemporary design, brand building, and strategic graphic design.</li> </ul>	<p>Five (5) years</p>
<p>Communications Expert</p> <ul style="list-style-type: none"> <li>• Shall conduct research and prepare Feature Articles about the voluntourism sites and community groups</li> <li>• Shall provide inputs in preparing the Marketing Communication Plan and Promotional Event.</li> <li>• Shall produce the pertinent voluntourism learning modules and serve as a resource person on pertinent topics during the teaching and coaching sessions</li> <li>• Has extensive experience (at least five (5) years) in in the following areas:</li> </ul>	<p>Five (5) years</p>

<ul style="list-style-type: none"> <li>○ Content creation and development</li> <li>○ Communications project management</li> <li>○ Creative writing</li> <li>○ Copy editing and writing</li> <li>● Has exposure to any or all the processes related to publicity, media, advertising, or any other allied field.</li> <li>● Has the ability to develop public relations projects and media releases</li> </ul>	
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\*Note: Bidders may recommend additional personnel deemed fit for the team.

#### VIII. PROJECT DURATION AND BUDGET

- The research shall commence upon the receipt of the Notice to Proceed and should be completed within six (6) months.
- The Approved Budget for the Contract (ABC) for the Project is **THREE MILLION NINE HUNDRED EIGHT THOUSAND TWO HUNDRED PESOS (PhP 3,908,200.00)**, inclusive of all applicable government taxes and charges, professional fees, bank charges, and other fees that may be incurred in the process.
- The consulting contract shall be a fixed-price contract.
- All manuals, reports, materials, databases, questionnaires, references, etc., acquired through the conduct of the survey research shall be turned over to DOT after the undertaking.

#### IX. PAYMENT SCHEME/SCHEDULE

Milestone	% of Payment
Upon approval of the Inception Report	20%
Upon submission and acceptance of the First (1st) Progress Report	20%
Upon submission and acceptance of the Second (2 <sup>nd</sup> ) Progress Report	20%
Upon presentation and acceptance of the Final Report	40%
Total	100%

#### X. CRITERIA FOR RATING

- Stage 1 – Submission of eligibility documents
- Stage 2 – Shortlisted bidders must submit brief company credentials and a proposed research plan together with the technical and financial proposal

##### A. Eligibility Check and Shortlisting Criteria for Rating

- Applicable Experience of the Consultant – 60 pts.
- Qualification of Personnel Assigned – 30 pts.
- Current Workload Relative to Capacity – 10 pts.

<b>I.</b>	<b>Applicable experience of the consultant</b>	
<b>A.</b>	Relevance of the company portfolio to the project	
	Bidder has conducted at least 2-3 tourism research projects	<b>20 pts.</b>
	Bidder has conducted one (1) tourism research project	10 pts.



	ADDITIONAL - Bidder has conducted at least one (1) voluntourism research project*	<b>5 pts.</b>
<b>B.</b>	<b>Years of experience</b>	
	Bidder has at least five (5) years of experience conducting research or consulting projects.	<b>20 pts.</b>
	Bidder has 3 to 4 years of experience conducting research or consulting projects.	10 pts.
<b>C.</b>	<b>Past clients</b>	
	Bidder has completed two (2) or more market or tourism research/planning projects with a contract cost equal to or greater than PHP 3,908,200.00.	<b>15 pts.</b>
	Bidder has completed one (1) market or tourism research/planning project with a contract cost equal to or greater than PHP 3,908,200.00.	10 pts.
<b>II.</b>	<b>Qualification of personnel assigned</b>	
	Three (3) of the assigned personnel have experience working on two (2) research projects in tourism and at least one (1) project with a capacity-building component	<b>30 pts.</b>
	Two (2) of the assigned personnel have experience working on two (2) research projects in tourism and at least one (1) project with a capacity-building component	20 pts.
<b>III.</b>	<b>Current Workload relative to capacity</b>	
	Bidder has 1 to 3 ongoing projects with contract costs equal to or greater than the Approved Budget for the Contract (ABC).	<b>10 pts.</b>
	Bidder has no ongoing projects with contract costs equal to or greater than the ABC.	5 pts.
	<b>Total</b>	100 points
	<b>Passing score</b>	70 points

\*Need supporting documents for additional points (Certificate of Completion)

### B. Technical Bid Criteria for Rating

- Qualification of personnel to be assigned – 70 pts.
- Plan of approach and methodology – 15 pts.
- Experience and capability of the firm – 15 pts.

<b>I.</b>	<b>Qualification of personnel to be assigned</b>	
<b>A.</b>	<b>Educational background</b>	
1.	The Team Leader has a Master's degree	<b>20 pts.</b>
2.	Three (3) of the assigned personnel (aside from the Team Leader) have a Master's degree	<b>15 pts.</b>
<b>B.</b>	<b>Professional Experience</b>	
1.	Two (2) of the assigned personnel have been involved in the implementation of one (1) research/study/or survey on voluntourism	<b>20 pts.</b>
	One (1) of the assigned personnel has been involved in the implementation of one (1) research/study / or survey on voluntourism	15 pts.

2.	Three (3) assigned personnel have membership in one (1) research-related professional society or association.	<b>15 pts.</b>
	1 or 2 assigned personnel have membership in one (1) research-related professional society or association.	10 pts.
<b>II. Plan of Approach and Methodology</b>		
<b>A. The substance of the proposal</b>		
1.	The proposal discusses the proposed project design, module, workshop design, and training methodology for the project.	<b>10 pts.</b>
2.	The proposal discusses the data collection to be employed in the project.	<b>5 pts.</b>
<b>III. Experience and Capability of the Firm</b>		
	Bidder has implemented three (3) similar tourism research contracts (contracts that involve market research/surveys/studies)	<b>10 pts.</b>
	Bidder has implemented two (2) similar contracts (contracts that involve market research/surveys/studies in any sector)	8 pts.
	Bidder has implemented one (1) similar contract (a contract that involves market research/surveys/studies in any sector)	5 pts.
	ADDITIONAL – Bidder has implemented one (1) market research/survey/study contract for LGU or government agencies. *	<b>5 pts.</b>
	<b>Total</b>	100 points
	<b>Passing score</b>	70 points

## XI. CONTACT INFORMATION

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