

TERMS OF REFERENCE

CONSULTANCY SERVICES FOR THE SUSTAINABLE DEVELOPMENT TRAINING

I. GENERAL INFORMATION

Service/Work Description: Sustainable Development Training
Project/Program Title: Procurement of Services of a Consultancy Firm for the Sustainable Development Training
Post Title: Consultancy Services
Duty Station: Tourism Development Planning Division – OTDPRIM, Department of Tourism
Duration: Approximately 4 man-months

II. BACKGROUND

With the significant growth and contribution of the tourism industry in the Philippines, the Department of Tourism was mandated to effectively and efficiently administer tourism development and promotion through the implementation of different plans, policies, programs, and projects to ensure that the tourism industry will continue to be an engine for investment generation, foreign exchange, and employment. This is in collaboration with various national government agencies, local government units, and private stakeholders.

Roger's Diffusion of Innovation Theory states that ideas and products are diffused over time and are adopted as standards. The key, however, is that it must be made known and seen as something new or innovative. The same is true in sustaining tourism development in the country. If tourism policymakers, planners, and managers are given information and successful development models, it would be easier for them to adopt or improve existing development frameworks suitable for their situation, especially in planning and implementing their tourism programs, projects, and activities sustainably.

It is for this reason that the DOT should establish a partnership with a reputable academic institution in conducting Sustainable Development Training to contribute to the advancement of the tourism industry anchored on the principles and practices of sustainability. It is deemed appropriate that the full utilization of research studies from policy-making up until its implementation will pave the way to achieving the above-mentioned vision.

The Sustainable Development Training is a capacity-building program for the Philippine Department of Tourism which generally aims to integrate the principles of sustainability into tourism policymaking, planning, management, and product development. It shall follow two prongs of the program:

- Program 1: A 1-month self-paced online program with a 2-day onsite, in-person session to be delivered at an agreed date. This is designed specifically for ATOP Officers, DOT Regional Offices' and Central Office Representatives.
- Program 2: A 4-day onsite, in-person program to be delivered at an agreed date. This is designed specifically for the DOT executive and management committee, its Regional Directors, and the Central Office's Representatives.

III. LEGAL BASIS

Under the Republic Act No. 9593, also known as the Tourism Act of 2009, the Department of Tourism (DOT) is mandated to spearhead the primary planning, coordination, implementation, and regulation of tourism development and governance in coordination with its attached agencies and other government institutions such as the local government units (LGUs). Given that, the Office of Tourism Development Planning, Research, and Information Management (OTDPRIM) shall provide technical assistance to the regional offices and the LGUs in formulating their tourism development plans following the existing national and local laws, rules, and regulations through the conduct of the Tourism Development Planning Capacity Building Program (TDPCBP).

To create a more efficient and effective way of capacitating the National Government and the Local Government Units to practice sustainability, the OTDPRIM through the Tourism Development Planning Division (TDPD) must make technical assistance more extensive and stronger by working with other reputable institutions through a training program for sustainable tourism development that is designed to:

1. Lead to improved coordination among stakeholders across the tourism value chain;
2. Create more profit-oriented opportunities that benefit the enterprise/organization, their member communities, and the environment; and
3. Ensure that the economic, social, and environmental impacts of tourism are favorable to all stakeholders.

The Sustainable Development Training is specifically designed for the tourism officers from various local government units, DOT-Central, and Regional Offices including its executives including the Regional Directors as key tourism managers. It will be a mechanism for strengthening the government's knowledge and actions in pursuing sustainability in all aspects of tourism development.

Following the strategic directions of the National Tourism Development Plan (NTDP) 2023-2028 to establish a sustainable, resilient, Filipino-centered, and globally competitive tourism industry, more key tourism managers in the national and local government would need to be empowered and provided with immediate technical assistance in ensuring the maximization of tourism benefits while also protecting and conserving the resources.

Moreover, the implementation of the Mandanas – Garcia Supreme Court Ruling in connection to the adjustment of shares from national revenues and Executive Order No. 138, s. 2021 and related DBM-DILG Joint Memorandum Circular Nos. 2021-01, 2021-02, and 2021-03 on the full implementation of decentralization and devolution would require more LGUs to have immediate technical assistance in developing their local tourism industry through establishing tourism and product development plans anchored on the principles of sustainability, resilience, Filipino identity, and competitiveness.

IV. OBJECTIVES

The program generally aims to build and develop the organizational and institutional capacities of the tourism officers and key tourism executives in tourism development planning and policy-making through sustainability efforts. At the end of the training program, the participants should be able to:

- To understand and acquire the language and principles of sustainability;
- To develop a sustainability project for their units;

- To present an implementation plan for their proposed sustainability project.

V. EXPECTED RESULTS

By the end of the contract period under this TOR, the Consultancy Firm is expected to successfully conduct and facilitate the Sustainable Development Training where the participants would be able to produce their sustainability/capstone project.

VI. SCOPE OF WORK

In this regard, the Consultant will undertake various tasks but not limited to the following stages and deliverables:

1. Design a micro-credential training program comprised of online and in-person sessions;
2. Secure the licenses for three online training modules on Sustainable Tourism Development with a Certificate of Completion for each of the participants from EarthCheck Research Institute/Typsy;
3. Conduct a maximum of one (1)-hour online onboarding session with DOT at an agreed date and time, to present the training rationale, objectives, expected learning outcomes, expected output, and timeline, before the start of the 1-month online training; confirmation of schedules should be done at least two (2) weeks before the actual program run;
4. Host the online onboarding session via online platform;
5. Agree on specific dates for participants to complete the one (1)-month online training;
6. Allow participants to complete the online modules of the program in one (1) month (30 days); and another 30 days to formulate their project proposals.
7. Conduct two (2)-full day in-person sessions for ATOP Officers, DOT Regional Offices' and Central Office's Representatives, and four (4)-full day in-person sessions for DOT's executive committee/management committee/regional directors, and project officers at an agreed date and venue.
8. Assign faculty experts to handle each of the in-person modules;
9. Provide meals, venue, and training materials to all participants;
10. Provide photo and video documentation during the in-person sessions;
11. Conduct a formal closing ceremony after the presentation of expected output;
12. Provide Certificates of Learning and Completion to the participants who shall comply with all academic requirements of the Training Program. Academic requirements include: (a) EarthCheck-Typsy Certificate of Completion for passing the quiz for each of the online modules; (b) attendance in all in-person modules; (c) presentation of expected output to a panel; and

13. Provide Certificates of Participation to participants who would not be able to comply with all academic requirements.
14. Provide Certificates of Appearance to all participants.
15. Organize a panel presentation comprising of the faculty identified in Section VI Item 8 and at least 3 experts from the tourism industry for the program of the DOT executive committee/management committee/regional directors, and project officers.

The Consultant shall be responsible for all the necessary documents and information pertinent to the conduct of the training program. They shall likewise submit any other related data or report that may be requested by the DOT.

VII. DELIVERABLES

The Consultant will be required to submit progress reports on the major activities required during the implementation. It shall include specifically the following outputs during the course of the engagement:

- ❖ Training Components
 - a. Development of Training Program Designs**
 - Training Programs, Modules, Licences, and Certification
 - Training Kits
 - Online platform/system
 - Facilitator/Resource person/s
 - b. Provision of Project Reports and Documentation**
 - c. Provision of Venue and Meals during the on-site/in-person training**
 - Inclusive of full board meals for 45 pax on Program 1 and 50 pax on Program 2
 - With consideration of guests with dietary restrictions (i.e. vegetarian, food allergies, diabetic, etc.)
 - Must be able to accommodate approximately fifty (50) persons during the in-person/on-site training per program.
 - Must include the following services and amenities in the function room:
 - Classroom setup
 - Secretariat table
 - Free-flowing coffee and tea
 - Mint/candies/chips
 - Complimentary conference Wi-fi access
 - AVP system
 - Widescreen Projector/LED
 - 3 wireless microphone
 - Whiteboard, flipchart, marker, and eraser
 - Paper/notepad and pencil

VIII. PROJECT DURATION

The program will run for at least four (4) man-months for the whole course of implementation of the sustainable development training and formulation of the necessary materials.

The project duration or schedule is based on working days and shall exclude the client's review and approval. The OTDPRIM-Tourism Development Planning Division shall be provided with a copy of each deliverable for review and comments.

IX. IMPLEMENTATION ARRANGEMENTS

The Consultant will be contracted under the DOT terms and conditions, and undertake the assigned tasks and responsibilities under the direct supervision of the Office of Tourism Development Planning, Research, and Information Management (OTDPRIM) of DOT. The Consultants will also be working closely with DOT, especially the Tourism Development Planning Division (TDPD) and DOT Regional Offices, Local Government Units, Academic Institutions, and other tourism stakeholders. The TDPD will provide the necessary administrative support. All local travel costs, professional fees, and logistical arrangements of the Consultants relative to the assignment, as well as the indicated costs of the participants shall be covered by the Consultants following the above deliverables and scope of work.

X. CONSULTANT QUALIFICATIONS AND EXPERIENCE

The consultancy firm should be an academic institution that has extensive experience in the formulation and preparation of modules, learning materials, tourism development plans, and tourism product development strategies for sustainability at an international or national scale. They should be able to provide licensed sustainable tourism modules through online and onsite arrangements in partnership with EarthCheck Research Institute.

The consultancy firm must likewise be highly competent technical experts with recognized international or national experience in local and overseas projects, as well as relevant education and training on tourism planning, sustainable tourism, sustainable development, product development, standards setting, local governance, economic, environmental, and socio-cultural planning. It is preferred that the consultancy firm have at least ten (10) years of prior experience and track record in undertaking similar or relevant projects within the context of the tourism industry.

Most importantly, the consultancy firm shall provide a team of tourism or multi-disciplinary experts/faculty who will be facilitating the training, which shall include but not be limited to the following key personnel:

1. One (1) Project Manager / Team Leader

- To plan, organize, direct and manage the planning, execution, reporting, production and communication of the Sustainable Development Training.
- Must have a Master's Degree or above in Tourism, Tourism Development and Management, Economics, Business Administration, Statistics, or other related courses.
- Must have a minimum of ten (10) years of professional experience in tourism planning and strategic development planning projects similar to or with greater magnitude and complexity.
- Has previous experiences in training adult learners.

2. One (1) Training Development Manager/Facilitator

- To plan, organize, and direct the execution of the development of project design and modules as well as derive strategies for the client.
- Must have at least a Master's degree in Tourism, Tourism Development, Management, Economics, Business Administration, Statistics, or similar qualifications.
- A minimum of five (5) years of experience in tourism planning, sustainable development, training/module development, socio-economic impacts, and tourism promotion at a country level.

3. One (1) Technical Support Staff

- To provide assistance to the development and execution of the Sustainable Development Training as well as to prepare reports/documentation.
- Must have a degree in Tourism, Tourism Development, Management, Economics, Business Administration, Statistics, or similar qualifications.
- Must have a minimum of two (2) years of experience in tourism planning and development, socio-economic impacts, technical writing, and project management.

XI. PROJECT BUDGET

The total allocation for the consultancy services for Sustainable Development Training is **NINE HUNDRED THIRTY-FOUR THOUSAND ONE HUNDRED SEVENTEEN PESOS AND 18/100 (PHP 934,117.18)**. The amount shall include Value-Added Tax (VAT) and all other applicable government taxes and charges and all professional, incidental, administrative costs incurred by the Consultants arising from the performance of the activities covered by the Scope of Work and Services such as but not limited to the cost of conducting meetings, training, and administrative costs such as printing and reproduction costs, transportation and all other expenses.

Payable in tranches based on the submitted milestone report on send-bill arrangement (Government Procedure):

- 1st Tranche Payment (40% of the total) shall be disbursed after the submission of an inception report, conduct of the online onboarding session for LGU tourism/ATOP officers, and purchase of licenses;
- 2nd Tranche Payment (30% of the total) shall be disbursed after the 30-day course with EarthCheck for LGU tourism/ATOP officers and after the online onboarding session for the DOT executive committee/management committee / regional directors;
- 3rd Tranche Payment (30% of the total) shall be disbursed within 1 month after the in-person sessions of the DOT executive committee/management committee / regional directors

XII. CONTACT PERSON


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Approved by:


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Office of Tourism Development Planning, Research and Information

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CRITERIA FOR RATING

Eligibility Check and Shortlisting Criteria for Rating

Applicable Experience of the Consultant – 50%

Qualification of Personnel Assigned – 35%

Approach and Methodology – 15%

CRITERIA	RATE	SCORE
I. APPLICABLE EXPERIENCE OF THE FIRM/COMPANY		
A. Years of Experience		
1. Bidder has at least ten (10) years experience in the formulation and preparation of modules, learning materials, tourism development plans, and tourism product development strategies for sustainability at an international or national scale.	20	
2. Bidder has at least nine (9) years experience in the formulation and preparation of modules, learning materials, tourism development plans, and tourism product development strategies for sustainability at an international or national scale.	15	
B. Number of similar projects completed/ Relevance of the company		
1. Bidder has conducted at least five (5) tourism/sustainability-related training programs or projects with government agencies and/or private entities.	20	
2. Bidder has conducted at least three (3) tourism/sustainability-related training programs or projects with government agencies and/or private entities.	10	
C. With affiliations with EarthCheck Research Institute	10	
II. QUALIFICATION OF PERSONNEL		
A.1 The Project Manager/Team Leader has worked on more than five (5) tourism/sustainability-related consultancy projects.	20	
A.2 The Project Manager/Team Leader has worked at least five (5) tourism/sustainability-related consultancy projects.	10	
B.1 All assigned personnel have experience working on more than five (5) tourism/sustainability-related consultancy projects.	15	
B.2 All assigned personnel have experience working on at least five (5) tourism/sustainability-related consultancy projects.	10	
III. APPROACH AND METHODOLOGY		
The program design, program delivery, and deliverables must be manifested in the proposal of the bidder.	15	
GRAND TOTAL	100	
PASSING RATE	70	

Prepared by:


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Noted by:


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