

TERMS OF REFERENCE

FOR THE PROCUREMENT OF EXPERTS ON THE CONDUCT OF THE DEPARTMENT OF TOURISM'S (DOT) STRATEGIC PLANNING AND MARKETING WORKSHOP

July 29 – August 2, 2024

Laurel, Batangas

I. RATIONALE

Strategic planning is critical for the DOT to effectively navigate the dynamic landscape of the tourism industry. With the NTDP 2023-2028 outlining ambitious goals for national tourism growth, the DOT must align its organizational strategy to these national priorities.

The DOT Strategic Planning aimed at developing a 3-year Organizational Strategic Plan for the Department of Tourism (DOT). The workshop will also introduce the first-ever Balanced Scorecard for the Department to align performance metrics with its mission to enhance tourism growth for the next three (3) years. This initiative will strengthen the alignment of departmental goals with the NTDP, establish baseline and targets, and ensure offices' performance commitment to enhance the overall efficiency and effectiveness of the DOT.

Likewise, a marketing workshop will assess the strategies, programs, and activities undertaken by the DOT Foreign Offices. The workshop will identify the requirements of the source markets and information on the destination's products available through a business-to-business exercise with DOT Regional Offices and the concerned Attached Agencies.

II. OBJECTIVES

The primary objectives of the DOT strategic planning and marketing workshops are the following:

- a) Develop a 3-year Organizational Strategic Plan aligned with the NTDP 2023-2028.
- b) Formulate the DOT Balanced Scorecard with Delivery Units to monitor and evaluate performance
- c) Conduct baseline evaluations and set performance targets
- d) Develop a monitoring and evaluation system for the performance and commitments of delivery units with the Secretary.
- e) Assess the strategies, programs, and activities of the DOT Foreign Offices
- f) Identify the requirements of the source markets and information on the destination's products available

III. SCOPE AND DELIVERABLES

The experts and facilitators will undertake various tasks to accomplish the program objectives as follows:

- a) Design the overall program structure by defining its key components, identifying central themes, and outlining the detailed flow of each workshop session to meet the above objectives in collaboration with the DOT organizer
- b) Develop detailed session plans for each workshop, including objectives, activities, materials and time allocations
- c) Prepare workshop materials for each session indicated in the workshop flow
- d) Disseminate pre-workshop materials to the participants to gather initial information and data needed in the workshops' core content and activities
- e) Conduct online onboarding activities with the participants to familiarize them with workshop objectives, structure, content, and expectations as well as to address questions and clarifications.
- f) Introduce and discuss the tools for strategic planning such as the balanced scorecard, baseline evaluations, performance management, and monitoring and evaluation system
- g) Assign experts to facilitate the strategic planning, formulation of the balanced scorecard, baseline evaluations, performance management, and monitoring and evaluation system
- h) Assist in the completion of workshop documents, presentations, and other outputs during plenary and breakout sessions
- i) Provide comments on the group exercises during breakout sessions to finalize their outputs
- j) Assist the DOT in formulating the draft final 3-year strategic plan and the balanced scorecard during the activities
- k) Facilitate the marketing workshop to come up with a product-driven market development plan aligned with the Secretary's directions and agreements reached during the strategic planning session and the NTDP.
- l) Design an evaluation plan to assess the effectiveness of the workshop and the achievement of the objectives
- m) Prepare the terminal report and other documentation requirements of the activities.

IV. SPECIALIST QUALIFICATIONS AND EXPERIENCE

The DOT needs a premier academic institution that can provide professional and exclusive insights, market dynamics, and policy developments in the design, facilitation, and execution of DOT Strategic Planning and Marketing Workshops.

1. Company Profile

- a) The educational institution is renowned for its expertise in tourism management, policy development, and planning. A team of seasoned professionals, academics, and industry practitioners to bring a wealth of knowledge and experience in the conduct of strategic planning.
- b) A proven track record with successful projects and partnerships within the tourism industry. Previous work with government agencies, private sector organizations, and international bodies that will highlight capabilities to deliver impactful results.
- c) With an extensive network of industry experts, policymakers, and business leaders which can be leveraged by DOT for strategic partnerships and collaborations.

2. Team Leader/ Members

The team must comprise of highly qualified professionals with expertise in tourism management, strategic planning, and policy development. Members should have strong academic backgrounds, significant industry experience, and a successful consultancy track record. The following criteria must be met:

- a) One (1) Project Manager/ Team Leader

Must have a Ph.D. in Tourism Management, Business Administration, Economics, or a related field from a reputable institution. Demonstrated expertise in tourism policy development, strategic planning, and sustainable tourism practices. Authored significant research papers, and articles on tourism, strategic planning, and development studies though not mandatory. With at least 2-years of experience in academic institutions with a strategic planning role.

- b) One (1) Market/ Research Analyst

Must have a Ph.D. or Master's degree in Tourism, Economics, Statistics, or related fields with 2 years of experience in academic institutions. Adept in data analysis, market research, and report writing.

- c) One (1) Development Specialist

Must have a Ph.D. or Master's degree in related fields. With experience in designing and delivering capacity-building programs with strong facilitation skills.

- d) One (1) Technical Support Staff

Must have a degree in Tourism, Management, Economics, or similar qualifications to provide technical assistance in the development and execution of the project

V. PROJECT DURATION

The project will commence on 15 July 2024 for the pre-event activities. The strategic planning and marketing workshops will run from 29 July – 2 August 2024.

VI. IMPLEMENTATION ARRANGEMENT

The experts shall be contracted under the DOT terms and conditions, and undertake the assigned tasks and responsibilities under the supervision of the Planning Service and the Office of Product and Market Development. The DOT will provide technical and administrative support. The experts and facilitators will be provided with meals and accommodations during the workshop proper.

VII. PROJECT BUDGET

The total allocation for the services of experts and facilitators is **SIX HUNDRED THOUSAND PESOS (PHP 600,000.00)**. The amount shall include value-added tax and all other applicable government taxes and charges and all professional costs incurred by the experts arising from the activities covered in the scope of work.

The amount is payable in full after the completion of the deliverables and workshop outputs on a send-bill arrangement.

VIII. CONTACT PERSON

MS. KATHRYN NICOLE G. ZAMOSA

Tourism Operations Officer II
Planning Service
09950781410
kgzamosa@tourism.gov.ph

Approved by:

MS. MERLYN Q. BAAL

OIC-Chief, Monitoring Division
Planning Service
mqbaal@tourism.gov.ph