

TERMS OF REFERENCE

- I. **BIDDER** : Consultancy Firm/Company
- II. **PROJECT TITLE** : Creation of the Strategic Framework for Philippine Wellness Tourism
- III. **IMPLEMENTATION PERIOD:** Three-month period upon awarding of the contract

IV. BACKGROUND

The National Tourism Development Plan of DOT has identified Medical Travel and Wellness Tourism as one of its ten (10) product portfolios. Aside from increasing the level of competitiveness of our country as a destination and improving the travel experience of the visitors, these products are also envisioned to bring economic benefits and inclusive growth to the country.

The Office of Product and Market Development (OPMD) – Medical Travel and Wellness Tourism (MTWT) plans and implements strategic product planning development plans and programs, and implements and monitors projects for the Wellness market (under the Health and Wellness Tourism Program). Thus, OPMD-MTWT sees the need for a strategic framework as we position the country as a globally-competitive wellness tourism destination.

The creation of the strategic framework will set a direction for the development of the wellness tourism industry in the Philippines. In order to develop the potential of the Philippines as a wellness destination, the DOT together with the key government players has to clearly define the strategic direction and goals by assessing its internal ecosystem and identifying strategies to move forward with the Program.

V. OBJECTIVES

The project is aimed at the following objectives:

- Come up with a Strategic Framework for Wellness Tourism that will set the direction for the development of Wellness Tourism in the Philippines
- Gather major wellness stakeholders and wellness practitioners to discuss best practices, insights, and recommendations on the plans and programs and move forward with the program.
- Strengthen the support and partnership between the private sector and the government, particularly the DOT and its partner agencies/institutions in positioning the Philippines as a wellness tourism destination both in the domestic and in the global market

VI. MINIMUM REQUIREMENTS

1. Must be a product, market or health research organization or company with experience in providing technical assistance to national/regional government agencies, local government units or international organizations; and
2. Must be registered/accredited with the Philippine Government Electronic Procurement Systems (PhilGEPS).

**** Note: Bidders must meet minimum eligibility requirements.**

VII. QUALIFICATIONS OF CONSULTANCY FIRM / COMPANY

The consultancy firm / company should possess the following qualifications:

Team Composition

Consultancy firm / company should provide a team composed of at least the following:

One (1) Account Director/Project Lead

- To plan, organize, direct and manage the planning, execution, reporting, production and communication of the strategic framework
- Must have at least 3 years' experience in health and/or wellness tourism-related activities, including research/consulting projects.
- Preferably a doctor or an allied health professional.

One (1) Research and Strategy Manager

- To plan, organize and direct the execution of the framework and derive strategies for the client;
- Should at least have two (2) years of experience in organizing and directing strategic framework of established local and international brands (health and/or wellness-related projects is an advantage);

One (1) Researcher/Strategic Planner

- To undertake all necessary work related to the project under the leadership and supervision of the Account Director/Project Lead and Research and Strategy Manager;
- Should at least have two (2) years of experience in organizing and directing strategic framework of established local and international brands (health and wellness-related projects is an advantage);

One (1) Workshop Facilitator

- To facilitate the strategic planning workshop for wellness tourism and the alignment workshop of the Filipino Brand of Wellness;
- Must have at least 2 years of experience in health and wellness tourism-related workshop projects

*****Note: Please provide CV to include list of health and/or wellness or product / market related projects conducted.***

VIII. SCOPE OF WORK AND DELIVERABLES

1. Create and develop the strategic framework for Wellness Tourism to be guided and approved by the end-user
 - a. Create and develop the strategic framework outlines and content
 - b. Make revisions based on the comments of the end-user
 - c. Present the Philippine Wellness Tourism Strategic Framework (draft/s and final output) to the end-user (DOT) and stakeholders, as needed/requested
2. Facilitate the Strategic Planning Workshop for Philippine Wellness Tourism (face-to-face or hybrid setup)
 - a. Prepare the Program of Activities (POA), workshop outline and facilitate the discussions and activities according to the POA for the strategic planning workshop for Philippine Wellness Tourism;
 - b. Develop and produce the visual aids, forms and other needed materials needed for the conduct of the activity;

- c. Suggest and execute activities that could help in the development of a comprehensive strategic planning for the Philippine Wellness Tourism;
 - d. Provide the online platform during the 3-day workshop for the participants who will be attending virtually in Luzon, Visayas, and Mindanao.
 - e. Consolidate and endorse the output of the activity and other necessary information gathered during the activity to be submitted to DOT MTWT on or before 28 December 2022; and
 - d. Provide and facilitate the virtual stakeholders' consultative meeting with the Wellness Tourism Stakeholders and revise the document based on the inputs of the stakeholders.
 - e. Document proceedings of the workshop and prepare/submit/present the comprehensive report
3. Facilitate the virtual public consultation/forum of the output for Wellness Tourism and present to the Wellness Tourism Industry Stakeholders (schedule of the public consultation/forum should be 2 weeks after the workshop).
 - a. Provide the virtual platform for the above public consultation/forum
 - b. Prepare the Program of Activities (POA), consultation/forum outline and facilitate the discussions and activities according to the POA public consultation/forum of the output for Wellness Tourism and present to the Wellness Tourism Industry Stakeholders
 - c. Document proceedings of the public consultation/form and prepare and submit a comprehensive report on the same
 - d. Lead a final working group meeting to incorporate feedback from the Public Consultation/Forum and finalize the Strategic Framework for Wellness Tourism.
 - e. Submit the Final Output of the Strategic Framework for Wellness Tourism on or before 10 January 2023 or as may be agreed.
 4. Facilitate the Updating or Alignment Workshop of the Filipino Brand of Wellness incorporating the final output of the Wellness Tourism Strategic Planning Workshop.
 - a. Prepare the Program of Activities (POA), workshop outline and facilitate the discussions and activities according to the POA for the alignment workshop for Filipino Brand of Wellness.
 - b. Provide the online platform during the 3-day alignment workshop for the participants who will be attending virtually in Luzon, Visayas, and Mindanao.
 - c. Document proceedings of the alignment workshop and prepare/submit/present the comprehensive report
 5. Present all outputs of the workshop and recommendations to DOT (to submit the Wellness Framework presentation, to be use by DOT in workshops and conferences).

IX. BUDGET

The total budget for the project is **Seven Hundred Sixty-Five Thousand Pesos (PHP 765,000.00)** of professional and technical fees and inclusive of all applicable taxes, service fees, bank charges, and other fees that may be incurred in the process.

X. TERMS OF PAYMENT

Payment for the services will be on send-bill arrangement and shall be made in tranches based on the following milestones at least 30-days upon submission of complete billing

and supporting documents. Billing Statement / Statement of Account must be addressed to the Department of Tourism

- **50% of the total contract price: upon the submission of the proponent, and receipt of the client of the following:**
 1. Initial draft of the Strategic Framework for Philippine Wellness Tourism
 2. Workshop/consultation/forum Program of Activities and Outline
 3. Details of the virtual platform to be used for the public consultation/forum
- **50% of the total contract price: upon the submission and presentation of the proponent, and receipt of the DOT of the following**
 1. Wellness Tourism Strategic Roadmap Final report and Wellness Framework presentation, to be use by DOT in workshops and conferences.
 2. Complete Report on the Strategic Planning Workshop for Philippine Wellness Tourism
 3. Complete Report on the virtual public consultation/forum of the output for Wellness Tourism and present to the Wellness Tourism Industry Stakeholders
 4. Complete Report on the Alignment Workshop of the Filipino Brand of Wellness

Note: The contracting party / consultant agrees that the project shall be governed by, and construed in all respects in accordance with the existing laws, rules and regulations of the Republic of the Philippines. Dispute resolutions shall likewise be governed and conducted within the Republic of the Philippines

XI. CRITERIA FOR RATING

Eligibility Check and Shortlisting Criteria for Rating

*Applicable Experience of the Consultant – 70 pts.
Qualification of Personnel Assigned – 30 pts.*

CRITERIA	POINTS
I. APPLICABLE EXPERIENCE OF THE FIRM/COMPANY	
<i>A. Years of Experience</i>	
1. Bidder has at least 3 years of experience in health and/or wellness-related or product/market-related projects, and or advocacies	30
2. Bidder has at least 2 years of experience in health and/or wellness-related or product/market-related projects, and or advocacies	20
<i>B. Number of similar projects completed/Relevance of the company</i>	
1. Bidder has conducted at least 2 health and/or wellness-related or product/market-related projects with government institutions	35
2. The bidder has conducted 1 health and/or wellness-related or product/market-related projects with government institutions	25
<i>C. With affiliations in health and wellness organizations, global, regional or national initiatives on health and/or wellness.</i>	5
II. QUALIFICATION OF PERSONNEL	
A. 1. All assigned personnel have experience working on at least 2 health and/or wellness-related or product/market-related consulting projects	20
A. 2. At least 3 of the assigned personnel have experience working on at least 2 health and/or wellness-related or product/market-related consulting projects	15
B. 1. The Account Director or Project Lead has worked on more than 5 health and/or wellness tourism-related or product/market-related consulting projects	10

B. 2. The Account Director or Project Lead has worked on at least 5 health and/or wellness tourism-related or product/market-related consulting projects	8
GRAND TOTAL	100
PASSING RATE	70

XII. CONTACT PERSONS

- Ms. Jeremiah "Miah" E. Adao
Tourism Operation Officer II
Medical Travel and Wellness Tourism
Product Planning and Development Division
Office of Product and Market Development
- Ms. Katherine A. Alcantara
OIC Chief, Product Planning and Development Division
Office of Product and Market Development

Contact Details

Landline: (+632) 8459-5200 local 519

Mobile: +63 917 906 2325

Email Address: jeadao@tourism.gov.ph / kaalcantara@tourism.gov.ph

Prepared by:

JEREMIAH E. ADAO
Tourism Operations Officer II
Medical Travel and Wellness Tourism

Approved by:

PAULO BENITO S. TUGBANG, M.D
Director
Office of Product and Market Development

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