

## TERMS OF REFERENCE

- I. BIDDER :** Consultancy/ Research/ Training Firm/ Company/ Institution
- II. PROJECT TITLE :** Development of Capability Building Modules for Wellness Tourism Stakeholders
- III. IMPLEMENTATION PERIOD:** Two-month period upon awarding of the contract

### IV. BACKGROUND

The National Tourism Development Plan (2023-2028) of DOT has identified Health and Wellness Tourism as one of the country's strategic products. 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 development of these products will also involve consultation and coordination with key government agencies and private sector investors.

Wellness Tourism, has been one of the priority products under the Product Planning and Development Division of the Office of Product and Market Development (OPMD-PPDD) of DOT that is expected to attract traffic in the domestic and international markets.

As part of the initiatives under the Wellness Tourism Strategic Framework crafted in cooperation with public and private sector partners and stakeholders, the OPMD-PPDD will spearhead the development training modules for the Filipino Brand of Wellness (FBW).

### V. OBJECTIVES

The project is aimed at the following objectives:

- Come up with three (3) Filipino Brand of Wellness Training Modules for Wellness Tourism stakeholders;
- To 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; and
- To support the Department's thrust in developing tourism products that will showcase and embody the "Filipino" brand of service and quality of experience.

### VI. MINIMUM REQUIREMENTS

1. Must be a research organization or company with experience in providing technical assistance to national/regional government agencies, local government units or international organizations on developing roadmaps/frameworks/training modules on tourism products/services such as wellness or the like.
2. Must be registered/accredited with the Philippine Government Electronic Procurement Systems (PhilGEPS).

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

## VII. BIDDER QUALIFICATIONS

The bidder should possess the following qualifications:

- a. Bidder has at least 3 years of experience in providing technical assistance for wellness-related or product/market-related projects, and or advocacies
- b. Bidder has conducted at least 2 wellness-related or product/market-related projects with government institutions
- c. Bidder has affiliations in health and wellness organizations, global, regional or national initiatives on health and/or wellness or other tourism products

### **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 development of the Filipino Brand of Wellness training modules
- Must have at least three (3) years of experience in product, market and/or wellness tourism-related activities, including research/consulting projects.

#### **One (1) Research and Strategy/Module Development Manager**

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

#### **One (1) Workshop/Training Facilitator**

- To facilitate the training module development workshops and the pilot-testing of the Filipino Brand of Wellness training modules;
- Must have at least 2 years of experience in health and wellness tourism-related or other tourism product workshop or training 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

### **A. Workshop 1 – Development of the three (3) Filipino Brand of Wellness Modules for the creation and development the three (3) Filipino Brand of Wellness Modules to be guided and approved by the end-user. (Target Date: October 12-15, 2023)**

- a. Create and develop the Filipino brand of wellness module outlines and content
- b. Make revisions based on the comments of the end-user
- c. Invite experts or resource persons for each module
- d. Facilitate the workshop activity for development of the three (3) FBW modules
- e. Prepare the Program of Activities (POA), workshop outline and facilitate the discussions and activities according to the POA for the workshop;
- f. Develop and produce the references, presentations, visual aids, forms and other needed materials needed for the conduct of the activity;
- g. Suggest and execute activities that could help in the development of the FBW training modules;

- h. Document proceedings of the workshop and prepare/submit/present the comprehensive report; and
- i. Post-Workshop: Consolidate the inputs gathered from the activity and from research or other references and build the comprehensive content of the training modules to be submitted to the end-user (Wellness Team) before the next workshop (Target date: October 26-28, 2023) or as may be agreed.

**B. Workshop 2 – Presentation of the Three (3) Filipino Brand of Wellness Training Modules to and Alignment with Stakeholders (Target Date: October 26-28, 2023)**

- a. Prepare the Program of Activities (POA), facilitate the discussions and activities according to the POA presentation of the three (3) FBW modules and to present to the Wellness Tourism Industry Stakeholders;
- b. Invite experts or resource persons for each module;
- c. Facilitate the conduct of the workshop in order to present, review, gather inputs for needed revisions
- d. Develop and produce the references, presentations, visual aids, forms and other needed materials needed for the conduct of the activity;
- e. Document proceedings of the public consultation/forum and prepare and submit a comprehensive report on the same; and
- f. Post-Workshop: Consolidate the inputs gathered from the activity and from research or other references and finalize the training modules to be submitted to the end-user (Wellness Team) before the pilot testing and/or actual training (Target Date: November 7-12, 2023) or as may be agreed.

**C. Pilot Testing (Target Date: November 7-12, 2023)**

- a. Facilitate the pilot testing of Filipino Brand of Wellness training modules
- b. Invite experts or resource persons for each module
- c. Prepare the Program of Activities (POA), training outline and facilitate the discussions and activities according to the POA for the pilot testing Filipino Brand of Wellness training modules.
- d. Document proceedings of the pilot testing and/or actual training and prepare/submit/present the comprehensive report; and
- e. Post-Pilot Testing: Consolidate the inputs gathered from the activity and from research or other references and make revisions/finalize the training modules to be submitted to the end-user (Wellness Team) on an agreed date.

**IX. BUDGET**

The total budget for the project is **Seven Hundred Sixty Thousand Pesos (PHP 760,000.00)** 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 client's receipt, approval and acceptance of the following:
  1. Initial Draft of the three (3) Filipino Brand of Wellness Training Modules
  2. Complete Report on Workshop 1
  3. Workshop/consultation/forum Program of Activities and Outline for Workshop 2

- **50% of the total contract price:** upon the submission of the proponent, and client's receipt, approval and acceptance of the following:
  1. Complete Report on Workshop 2
  2. Complete Report on the Pilot-testing
  3. Revised Drafts of the three (3) Filipino Brand of Wellness Training Modules Post-Workshop 1 and 2
  4. Final versions of the three (3) Filipino Brand of Wellness Training Modules Post-Workshop 1, 2 and the Pilot-testing

**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
<b>I. APPLICABLE EXPERIENCE OF THE FIRM/COMPANY</b>	
A. Years of Experience	
1. Bidder has at least 3 years of experience in wellness-related or product/market-related projects, and or advocacies	30 ✓
2. Bidder has at least 2 years of experience in wellness-related or product/market-related projects, and or advocacies	20
B. Number of similar projects completed/Relevance of the company	
1. Bidder has conducted at least 2 wellness-related or product/market-related projects with government institutions	35 -
2. The bidder has conducted 1 wellness-related or product/market-related projects with government institutions	25
C. With affiliations in health and wellness organizations, global, regional or national initiatives on health and/or wellness.	5 ✓
<b>II. QUALIFICATION OF PERSONNEL</b>	
A. 1. All assigned personnel have experience working on at least 2 wellness-related or product/market-related consulting projects	20
A. 2. At least 2 of the assigned personnel have experience working on at least 2 wellness-related or product/market-related consulting projects	15
B. 1. The Account Director or Project Lead has worked on more than 5 wellness tourism-related or product/market-related consulting projects	10
B. 2. The Account Director or Project Lead has worked on at least 5 wellness tourism-related or product/market-related consulting projects	8
<b>GRAND TOTAL</b>	<b>100</b>
<b>PASSING RATE</b>	<b>70</b>

## XII. CONTACT PERSON

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Approved by:

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

Date: 21 September 2023