

# ANNEX A: TERMS OF REFERENCE

## TERMS OF REFERENCE (TOR)

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### PROCUREMENT OF THE SERVICES OF A RESEARCH/SURVEY COMPANY TO CONDUCT THE 2020 TPB CUSTOMER SATISFACTION SURVEY

#### **BACKGROUND AND OBJECTIVES:**

The Tourism Promotions Board (TPB), an attached agency of the Department of Tourism, is mandated to market and promote the Philippines as a major global tourism destination. TPB envisions the Philippines to become the preferred destination for safe, uniquely diverse, and fun travel by 2025. With this goal, TPB has been organizing promotional programs which include business/sales missions, roadshows, tourism marketing educational seminars, product inventories and major tourism events such as the Philippine Travel Exchange (PHITEX) and Philippine MICE Conference (MICECON). TPB is also participating in overseas and local travel trade fairs and implementing invitational programs/familiarization tours for travel agents, TV/magazine personalities, travel bloggers, social media influencers and key opinion leaders to boost its promotional efforts of the Philippines. The exhibitors, program attendees, familiarization trip participants and social media influencers taking part in these projects/events are hereby treated as the customers of TPB.

In TPB's commitment of improving its services to customers and comply with its performance agreement with the Governance Commission for Government-Owned and Controlled Corporations (GCG), the agency has been commissioning the services of a research/survey company every year since 2015 to conduct a transparent and objective Customer Satisfaction Survey. The survey is designed to assess the TPB customers' overall satisfaction and perception on the services rendered to them by the agency during the implementation of its international and domestic projects/events.

The research/survey company is required to conform to the following guidelines prepared by GCG for the implementation of the 2020 TPB Customer Satisfaction Survey:

- a. Enhanced Standard Guideline on the Conduct of Customer Satisfaction Survey (released on 26 September 2019).
- b. Additional Guidelines in the Conduct of the Customer Satisfaction Survey (CSS) for 2020 in the GOCC Sector (released on 19 August 2020).

#### **DEFINITION OF TPB CUSTOMERS:**

**Exhibitors-** private sector representatives who joined the travel trade fairs or domestic promotion events (e.g. International Boat Show- Dusseldorf, Tourism Expo Japan, Regional Travel Fair) that were either organized or supported by TPB. All of these customers are based in the Philippines.

**Attendees-** private sector representatives who joined the TPB educational seminars business/sales missions, roadshows, and major tourism events (e.g. Philippine Travel Exchange, Philippine MICE Conference). These customers are a mix of Filipinos and foreigners living within or outside the Philippines

**Familiarization Trip Participants and Social Media Influencers-** travel agents and media personalities (e.g. TV/magazine writers, celebrities, production crew, travel bloggers, key opinion leaders, and alike) who joined the invitational programs/familiarization trips and tourism destination inventories implemented by TPB. Majority of these customers are foreigners and based abroad.

**SURVEY METHODOLOGY:**

a. Below are the recommended survey methodologies per customer type:

<b>CUSTOMER TYPE</b>	<b>METHODOLOGY</b>
Exhibitors	Telephone
Attendees	Online Survey Tool/Platform
Familiarization Trip Participants and Social Media Influencers	Online Survey Tool/Platform

b. Conduct of Telephone Interviews:

- The procedures undertaken to corroborate the consistency and accuracy of the telephone interviews must be detailed in the Back-Checking Report, which will be submitted to GCG as part of the Quarterly Monitoring Report.
- Through back-checking, a project team member other than the original interviewer/enumerator shall re-contact the respondent to check the quality and validity of the interviews/outputs.
- It shall be the task of the interviewer/enumerator to fill-out the questionnaires administered through telephone interview. Considering the mode employed, the signature of the respondents shall be dispensed with. The Spot-Checking and Back-Checking Reports must detail that the respondents were correctly identified and their answers were accurately reflected.

c. Conduct of Interviews through Online Survey Tool/Platform

- The use of an online survey tool/platform for data gathering should be accompanied by a report detailing the comprehensive quality control measures employed to ensure the validity and reliability of the data collected. The report will be incorporated in the Quarterly Monitoring Report.

**SAMPLE SIZE:**

Due to the COVID-19 pandemic, numerous scheduled projects/events of TPB have been cancelled, while others were postponed several times. With the fluid global situation brought by the pandemic, the population of TPB’s customers may change further within the year.

**Indicatively, the sample size for 2020 is projected to range from 224 to 300 respondents.** The sample size and its distribution per customer type will be finalized during the preparation of the Inception Report. The formula below will be used for the computation:

$$\text{Sample size} = \frac{\frac{z^2 \times p \times (1-p)}{e^2}}{1 + \left(\frac{z^2 \times p \times (1-p)}{e^2 N}\right)}$$

- Where z = 1.96 at 95% confidence level
- N = target universe or population
- e = margin of error at +/-4.3%
- p = sample proportion

**SCOPE OF WORK:**

- a. Finalization of the sample size per customer type.
- b. Use of the GCG-approved questionnaires composed of a screener test and a main questionnaire. Service specific questions can be added to the questionnaires (under the Execution of Service Section) subject to the approval of TPB.
- c. Follow the 5-point Likert scale for all rating questions.

Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1

- d. Signing of a Non-Disclosure and Confidentiality Agreement by the researchers and all of their partners to ensure confidentiality of the data (e.g. contact details of customers) to be provided to them by TPB.
- e. Recruitment of respondents: contact details will be provided by TPB after signing of the Data-Sharing Agreement.

- f. Adherence to the rules and procedures for data collection, quality control, and data processing as stated in the GCG guidelines.
- g. Analysis of survey results with the minimum required information as follows:
  - i. Data Gathering Methodology (i.e. sampling procedure, total primary customers, sample size used, survey methodology, frequency of data collection).
  - ii. Percentage of satisfied customers using the Top 2 Box (Very Satisfied and Satisfied)
  - iii. Average of the overall satisfaction rating.
  - iv. Crosstabs of the reasons for overall satisfaction rating against type of raters (positive and negative).
  - v. Derived Importance thru Correlation and Modified Kruskal Analysis.
  - vi. Scatter Diagram of derived importance and average performance score.
  - vii. Apostle Model of Customer Loyalty
  - viii. Trending analysis of the results of the TPB Customer Satisfaction Survey in the past five (5) years (as much as feasible) using similar criteria.
- h. Interpretation and analysis of the results based on the following segments:
 

<ol style="list-style-type: none"> <li>i. By total respondents</li> <li>ii. By areas of coverage</li> <li>iii. By customer type</li> </ol>	<ol style="list-style-type: none"> <li>iv. By rating (positive/negative raters)</li> <li>v. By drivers of satisfaction (derived importance)</li> </ol>
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**DELIVERABLES:**

- a. Inception Report
- b. Questionnaires with recommended additional question items for the Execution of Service section
  - ✓ With corresponding translations to other languages as needed.

*Note: Copy of the questionnaires will be provided upon request of the interested bidders.*
- c. Quarterly Monitoring Report
- d. Draft Survey Report
- e. Comprehensive Final Report (3 hard copies and digital format)
  - ✓ Full report on findings and analysis as required by the GCG guideline
  - ✓ Conclusions and recommendations for the improvement of service delivery
  - ✓ Tabulation of aggregate data (excel format)
  - ✓ Sample accomplished survey forms (5 per customer type)
- f. Powerpoint Presentation of the Comprehensive Final Report

**CONTENTS OF THE QUARTERLY MONITORING REPORT:**

<b>ACTIVITY</b>	<b>DOCUMENTS FOR SUBMISSION</b>
Pre-Test	Survey Instrument Stimulus Materials Pre-Test Results Pre-Test Report
Training	Survey Instrument Stimulus Materials Training Manuals Training Report
Project Kick-off/Start-off	Survey Instrument Stimulus Materials Observation Report Clearing/Debriefing Report
Project Implementation	Supervision/Observation Report Fieldwork Progress Report
Back-checking and Spot-checking	Back-checking and Spot-checking Report Report on Automated Checks (for CAPI surveys)
Data Processing	Spot Checking Report for Data Processing Data Quality Control Report

**APPROVED BUDGET FOR THE CONTRACT (ABC):**

The 2020 TPB Customer Satisfaction Survey shall be undertaken for the amount of **Two Million Five Hundred Thousand Pesos (Php 2,500,000.00)** inclusive of value-added tax (VAT) and other applicable taxes and fees.

**DURATION OF WORK:**

Below is the indicative schedule of activities:

<b>Date</b>	<b>Activities/ Deliverables</b>
07 December 2020	Kick-Off Meeting between the research/survey company and TPB representatives
10 December 2020	Submission of the Inception Report and Questionnaires (with inputs)- 1 <sup>st</sup> draft
12 December 2020	TPB's submission of comments on the Inception Report and Questionnaires
16 December 2020	Submission of Inception Report and Questionnaires (with inputs)- 2 <sup>nd</sup> draft
18 December 2020	TPB's submission of comments on the Inception Report and Questionnaires

Date	Activities/ Deliverables
22 December 2020	Submission of the Final Inception Report and Questionnaires
23 December 2020 – 12 January 2021	Pilot-testing of the Questionnaires
15 January 2021	Submission of Pilot-testing results and finalized survey questionnaires
15 January 2021	Submission of the Quarterly Monitoring Report (Q4)
19 January 2021	TPB’s approval of the finalized survey questionnaires
20 January – 17 February 2021	Data collection proper
26 February 2021	Submission of the Draft Full Report- 1 <sup>st</sup> draft
10 March 2021	Submission of the Draft Full Report- 2 <sup>nd</sup> draft
22 March 2021	Submission of the Comprehensive Final Report (in hardcopies and digital format)
25 March 2021	Presentation of the Comprehensive Final Report (in ppt) to the TPB Management Committee

**Note:** Proposed timeframe may be adjusted subject to the recommendation of the research/survey company and the approval of TPB.

**QUALIFICATIONS OF THE RESEARCH/SURVEY COMPANY:**

- a. The research/survey company should possess at least five (5) years of experience in conducting customer satisfaction surveys and related researches, including analysis and presentation. The research/survey company must submit a list of ongoing and completed government and private contracts for the last five (5) years.
- b. All key personnel (based on item f below) to be assigned in the project should have at least three (3) years of relevant work experience in conducting research/surveys. Curriculum vitae of all key personnel must be submitted.
- c. Has provided services to multinational clients in the past three (3) years (provide copy of Notice to Proceed, Contract, Certificate of Project Completion, or whichever is applicable).
- d. Member of good standing in any internationally-recognized association of marketing research agencies (provide proof of membership and/or certificate of good standing).
- e. Compliant to legal standards on data privacy and protection.
- f. Conformity to the key personnel composition as stated in the GCG guideline:
 

<ul style="list-style-type: none"> <li>➤ Overall Project Manager</li> <li>➤ Assistant Project Managers (Project Manager &amp; Statistician)</li> <li>➤ Overall Field Manager</li> </ul>	<ul style="list-style-type: none"> <li>➤ Overall Data Processing Manager</li> <li>➤ Data Processing Supervisor / Digital Operations Supervisor OR Encoding Supervisor</li> </ul>
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**TERMS OF PAYMENT:**

The indicative payment scheme is as follows:

OUTPUT/MILESTONE	% OF PAYMENT
Upon submission and approval of the Inception Report	15%
Upon submission of pilot-test report and approval of survey questionnaires	15%
Upon submission of all documents included in the Quarterly Monitoring Report	15%
Upon submission and approval of the 1 <sup>st</sup> draft of full report on findings and recommendations	25%
Upon submission and approval of the Comprehensive Final Report (in hardcopies and digital format)	20%
Upon presentation of the Final Report (in powerpoint format) to the TPB Management Committee (MANCOM)	10%
<b>TOTAL</b>	<b>100%</b>

*Note: The research/survey company should have a Landbank account. Payment will be made through LBP bank deposit. Otherwise, bank charges will be shouldered by the research/survey company.*

**SHORTLISTING CRITERIA AND RATING SYSTEM:**

Based on section 24.5.3 of R.A. 9184, the criteria and rating system for the shortlisting of research/survey agencies is as follows:

	PARTICULARS	PERCENTAGE	RATING
<b>I.</b>	<b>Applicable Experience of the Research/Survey Company</b>		<b>50%</b>
A.	At least 5 years of experience in conducting customer satisfaction surveys and related researches, including analysis and presentation.	30%	
	With ≥6 years of experience (30%)		
	With 5 years of experience (25%)		
	With <5 years of experience (0%)		
B.	Successfully implemented similar projects within the last 5 years (minimum of 3 customer satisfaction survey-related projects, with at least 1 government client). <i>Based on submitted Certificates of Project Completion showing satisfactory delivery of service.</i>	15%	
	Minimum of 3 customer satisfaction survey-related		

	<b>PARTICULARS</b>	<b>PERCENTAGE</b>	<b>RATING</b>
	projects, with at least 1 government client (15%)		
	Minimum of 3 customer satisfaction survey-related projects, but no government client (10%)		
	Less than 3 customer satisfaction survey-related projects (0%)		
	C. Member of good standing in any internationally recognized association of marketing research agencies. <i>Bidder should provide proof of membership and/or certificate of good standing.</i>	5%	
	With membership in any internationally-recognized association of marketing research agencies (5%)		
	No membership in any internationally-recognized association of marketing research agencies (0%)		
<b>II.</b>	<b>Qualification of personnel who may be assigned to the project</b>		<b>30%</b>
	All key personnel should have at least 3 years of work experience in conducting surveys or qualitative and quantitative research.		
	All key personnel have more than 3 years of work experience (30%)		
	All key personnel have 3 years work experience (25%)		
<b>III.</b>	<b>Current Workload relative to Capacity</b>		<b>20%</b>
	The research/survey company is currently handling maximum of 10 projects.		
	Currently handling 5 or less projects (20%)		
	Currently handling 6-10 projects (15%)		
	Currently handling more than 10 projects (0%)		
	<b>TOTAL</b>		<b>100%</b>

**Hurdle rate for Shortlisting: At least 85%**

**TECHNICAL PROPOSAL:**

Bidders are required to present their plan of approach for the project (maximum of 20 minutes).



Based on section 33.2.2. of R.A. 9184, the technical proposal and presentation of the bidders shall be evaluated based on the following criteria with corresponding numerical weights:

	<b>PARTICULARS</b>		<b>PERCENTAGE</b>	<b>RATING</b>
<b>I.</b>	<b>Quality of Personnel to be assigned to the Project</b>			<b>15%</b>
	Profile and expertise of key personnel who will be assigned to the project, showing specialization in conducting quantitative and qualitative research in customer satisfaction.			
	<i>With a Statistician in the team that has an experience in conducting customer satisfaction surveys (15%)</i>			
	<i>Without a Statistician in the team but has experience in conducting customer satisfaction surveys (10%)</i>			
<b>II.</b>	<b>Research/Survey Company's Experience and Capability</b>			<b>40%</b>
	A.	Bidder's expertise in conducting surveys using different methodologies for reaching specific customer types and capacity to implement the survey in an international coverage.	20%	
		<i>With more than 6 years' experience in using different methodologies for reaching specific customer types and capacity to implement the survey in an international coverage. (20%)</i>		
		<i>With more than 5 years' experience in using different methodologies for reaching specific customer types and capacity to implement the survey in an international coverage. (15%)</i>		
	B.	Quality and quantity of similar surveys handled.	10%	
		<i>With 4 or more similar surveys (10%)</i>		
		<i>With 3 similar surveys (5%)</i>		
		<i>Less than 3 similar surveys (0%)</i>		
	C.	Quality / profile of previous clients in similar projects.	10%	
		<i>With 3 or more similar surveys and 1 government client (10%)</i>		
		<i>With 3 or more similar surveys but no government client (5%)</i>		
		<i>Less than 3 similar surveys (regardless if there is a government client or none) (0%)</i>		
<b>III.</b>	<b>Plan of Approach and Methodology</b>			<b>45%</b>

	<b>PARTICULARS</b>		<b>PERCENTAGE</b>	<b>RATING</b>
	A.	Consistency of the proposed workplans with the standard guidelines of GCG.	20%	
	B.	Project plan approach to achieve the deliverables/ expected outputs within the specified timeframes.	15%	
	C.	Manner of presenting the survey results and recommendations.	10%	
	<b>TOTAL</b>			<b>100%</b>

**Hurdle rate for Technical Proposal: At least 85%**

The research/survey company is expected to submit technical and financial proposals which shall be evaluated using the Quality Cost Based Evaluation (QCBE). The winning bidder must attain a **hurdle rate of 85%** based on the following weight assignments:

<b>Proposal</b>	<b>Weight (%)</b>
Technical	85
Financial	15
TOTAL	100