

TERMS OF REFERENCE (TOR)

PROCUREMENT OF THE SERVICES OF A RESEARCH COMPANY FOR THE 2023 TPB CUSTOMER SATISFACTION SURVEY AND UNIFICATION OF TPB'S CUSTOMER FEEDBACK MECHANISMS

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 sustainable, uniquely diverse, and fun travel by 2028.

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 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 company is required to follow the "*Enhanced Standard Guideline on the Conduct of Customer Satisfaction Survey*", as released by the GCG on 26 September 2019, for the implementation of the 2023 TPB Customer Satisfaction Survey.

Further, in view of the TPB's aim of streamlining its operations, the agency shall also require the services of the research company in unifying and integrating its customer feedback mechanisms. Currently, aside from the GCG-prescribed Customer Satisfaction Survey, the TPB is also implementing an internally-administered survey through the distribution of post-event evaluation forms to TPB customers, in compliance with ISO 9001:2015 standards. To prevent survey fatigue among TPB customers and pursue efficient utilization of resources, the TPB intends to merge the GCG-prescribed Customer Satisfaction Survey and the ISO-mandated Customer Feedback, with the unified survey to be rolled-out in January 2024.

A. 2023 TPB CUSTOMER SATISFACTION SURVEY

Definition of TPB Customers:

Exhibitors/Sellers- private sector representatives who joined travel trade, MICE, and consumer fairs as members of the Philippine tourism delegation and shared booth space with the TPB. This customer type also includes private sector representatives who participated in business-to-business meetings such as during business and sales missions, roadshows, sales presentation, and the Philippine Travel Exchange (PHITEX).

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 influencers programs implemented by TPB. These customers are a mix of Filipinos and foreigners living within or outside the Philippines.

Survey Methodology & Sample Size:

Below is the recommended methodology and sample size for the 2023 Customer Satisfaction Survey:

CUSTOMER TYPE	INDICATIVE SAMPLE SIZE	METHODOLOGY
Exhibitors/Sellers	500	Online Survey Tool/Platform
Familiarization Trip Participants and Social Media Influencers	100	
TOTAL	600	

The sample size is set depending on the number of indicative participants per customer type. It will be finalized during the preparation of the Inception Report.

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.

Scope of Work:

- Finalization of the sample size per customer type.
- Use of the GCG-prescribed 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.
- Recruitment of respondents: Contact details will be provided by TPB after signing of the Data-Sharing Agreement.
- Adherence to the rules and procedures for data collection, quality control, and data processing as stated in the GCG guidelines.
- Conduct of one (1) Focus Group Discussion (FGD) with the satisfied respondents and another one for dissatisfied respondents (if there are significant number of dissatisfied customers) to gather qualitative insights about the best practices of TPB, service areas for improvement, and other suggestions. The size and criteria for the FGD will be based on the recommendation of the research company, subject to the approval of TPB.
- Provision of tokens for the respondents of the survey and the FGD.
- 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. 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:
 - i. By total respondents
 - ii. By areas of coverage
 - iii. By customer type
 - iv. By rating (positive/negative raters)
 - v. By drivers of satisfaction (derived importance)

Deliverables:

- a. Inception Report
- b. Questionnaires with recommended additional question items for the Execution of Service section. Questionnaire translation to Korean, Mandarin, Japanese, and German is required
- c. Quarterly Monitoring Reports (2nd to 4th Quarter)
- d. Transcript/narrative of the conducted FGD
- e. Draft Survey Report on findings, analyses and recommendations.
- f. Comprehensive Final Report (3 hard copies and digital format)
 - ✓ Full report on findings and analysis as required by the GCG guideline
 - ✓ Insights gathered from the FGD, which will also be incorporated in the analysis
 - ✓ Conclusions and actionable recommendations to address the survey findings
 - ✓ Data Quality Control Report
 - ✓ Tabulation of aggregate data (excel format)
 - ✓ Sample accomplished survey forms (minimum of 5 per customer type)
- g. Presentation of the Comprehensive Final Report (ppt) to the TPB Management Committee (MANCOM)

Contents of the Quarterly Monitoring Reports:

ACTIVITY	DOCUMENTS FOR SUBMISSION
Pre-Test	Survey Instrument Stimulus Materials Pre-Test Results

ACTIVITY	DOCUMENTS FOR SUBMISSION
	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

Note: The submission of the above reports and documents is dependent on the quarter applicable. For example, if the Pre-test was conducted on the 2nd Quarter, then the reports under it shall be included in the 2nd Quarter Monitoring Report.

Duration of Work:

Below is the indicative schedule of activities (subject to change based on the mutual agreement of the TPB and winning bidder):

Date	Activities/ Deliverables
05 June 2023	Kick-Off Meeting between the research company and TPB representatives
09 June 2023	Submission of the Inception Report and Questionnaires (with inputs)- 1 st draft
13 - 30 June 2023	Review, revision, and finalization of the Inception Report and Questionnaires
03 -07 July 2023	Pilot-testing of the Questionnaires
13 July 2023	Submission of Pilot-testing results and finalized survey questionnaires
20 July 2023	TPB's approval of the finalized survey questionnaires
21 July 2023 – 15 January 2024	Data collection proper Note: Data collection period may extend up to 31 January 2024 to ensure that the required number of respondents is met.
15 July 2023	Submission of the Quarterly Monitoring Report (Q2)
15 October 2023	Submission of the Quarterly Monitoring Report (Q3)
15 January 2024	Submission of the Quarterly Monitoring Report (Q4)

Date	Activities/ Deliverables
19 January 2024	Conduct of the Focus Group Discussion (FGD)
19 February 2024	Submission of the Draft Full Report- 1 st draft
01 March 2024	Submission of the Draft Full Report- 2 nd draft
15 March 2024	Submission of the Comprehensive Final Report (in hardcopies and digital format)
22 March 2024	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 company and the approval of TPB.

B. UNIFICATION OF TPB'S CUSTOMER FEEDBACK MECHANISMS

Scope of Work

- Review of the ISO 9001:2015 to ensure that the unified survey is aligned to the standard's requirements.
- Review of the GCG-issued Enhanced Standard Guideline on the Conduct of Customer Satisfaction Survey
- Ensure that the unified survey adheres to the Data Privacy Act
- Assistance in updating the TPB's System Procedures Manual (SPM) for the unified survey, with focus on the survey methodology, sample size, rating scale, data quality control, handling of comments and inputs from respondents, and reporting of survey results
- Revision of TPB's post-event evaluation forms based on the GCG-prescribed questionnaires and current feedback forms
- Preparation of report templates

Deliverables

- Inception Report (can be incorporated in the Inception Report for the 2023 TPB Customer Satisfaction Survey)
- Finalized System Procedures Manual (SPM) for the unified survey
- Updated Post-Event Evaluation Forms pertaining to the unified survey:

Exhibitor/Seller-related:

- Sellers Evaluation Form (QF-MPRO-15, QF-IPRO-04)
- Philippine Travel Exchange- Seller Evaluation Form (QF-IPRO-01)
- MICE Business Meet Seller Evaluation Form (QF-MICE-16)
- MICE Trade Fair Participation Feedback Form (QF-MICE-03, QF-MICE-08)
- Post-Event Evaluation Form (Sales Mission) (QF-MPRO-21)
- Regional Travel Fair Seller Evaluation Form (QF-DPRO-09, QF-DPRO-09B)

Familiarization Trip-related:

- Product Update Feedback Form (QF-DPRO-04)
- Invitational Program Participation Evaluation Form (QF-MPRO-03, 03A- 03D)**
- MICE Invitational Program Evaluation Form (QF-MICE-11)**
- Media Invitational Program Participation Evaluation Form (QF-MCOM-14, 14A-14C)**

***With translated version to Mandarin, Japanese, Korean, and German*

- d. Report templates for monthly, quarterly, and annual reporting of consolidated survey results
- e. Report templates for providing survey results per project and per project category

Duration of Work:

Below is the indicative schedule of activities *(subject to change based on the mutual agreement of the TPB and winning bidder)*:

Date	Activities/ Deliverables
05 June 2023	Kick-Off Meeting between the research company and TPB representatives
09 June 2023	Submission of the Inception Report
13 - 30 June 2023	Review, revision, and finalization of the Inception Report
03 – 21 July 2023	Review, revision, and finalization of the System Procedures Manual (SPM) for Handling of Customer Feedback
24 July – 25 August 2023	Updating of the Post-Event Evaluation Forms (Questionnaires) of TPB
29 August – 22 September 2023	Preparation of the report templates

APPROVED BUDGET FOR THE CONTRACT (ABC):

The project 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.

QUALIFICATIONS OF THE RESEARCH COMPANY:

- a. The research company should possess at least five (5) years of experience in conducting customer satisfaction surveys and related researches, including analysis and presentation. *The research 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 e 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. Member in any internationally-recognized association of marketing research agencies (*provide proof of membership*).
- d. Compliant to legal standards on data privacy and protection (*Must submit certification/proof*).
- e. Conformity to the key personnel composition as stated in the GCG guideline:
 - Overall Project Manager
 - Assistant Project Managers (Project Manager & Statistician)
 - Overall Field Manager
 - Overall Data Processing Manager
 - Data Processing Supervisor / Digital Operations Supervisor OR Encoding Supervisor
 - Copywriter/Editor

TERMS OF PAYMENT:

The indicative payment scheme is as follows:

OUTPUT/MILESTONE	% OF PAYMENT
Upon submission and approval of the Inception Report (2023 Customer Satisfaction Survey and Customer Feedback Mechanism Unification)	15%
Upon completion and approval of the specified deliverables for the unification of TPB's customer feedback mechanisms	40%
Upon completion and approval of the specified deliverables for the 2023 TPB Customer Satisfaction Survey	45%
TOTAL	100%

Note: The research company should have a Landbank account. Payment will be made through LBP bank deposit. Otherwise, bank charges will be shouldered by the research 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 agencies is as follows:

	PARTICULARS	PERCENTAGE	RATING
I.	Applicable Experience of the Research Company		50%
A.	At least 5 years of experience in conducting customer satisfaction surveys and related researches, including analysis and presentation.	30%	

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

	PARTICULARS	PERCENTAGE	RATING
	<i>Currently handling 6-10 projects (15%)</i>		
	<i>Currently handling more than 10 projects (0%)</i>		
	TOTAL		100%

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:

	PARTICULARS	PERCENTAGE	RATING
I.	Quality of Personnel to be assigned to the Project		15%
	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>		
II.	Research Company's Experience and Capability		40%
	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 at least 5 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 less than 5 years' experience in using different methodologies for reaching specific customer types and capacity to implement the survey in an international coverage. (0%)</i>		
	B. Quantity of similar surveys handled.	10%	
	<i>With more than 3 similar surveys (10%)</i>		
	<i>With 3 similar surveys (5%)</i>		

	PARTICULARS		PERCENTAGE	RATING
		<i>Less than 3 similar surveys (0%)</i>		
	C.	Quality / profile of previous clients in similar projects.	10%	
		<i>With at least 3 similar projects and 1 government client (10%)</i>		
		<i>With at least 3 similar projects but no government client (5%)</i>		
		<i>Less than 3 similar projects (regardless if there is a government client or none) (0%)</i>		
III.	Plan of Approach and Methodology			45%
	A.	Consistency of the proposed workplans with the standard guidelines of GCG.	15%	
	B.	Project plan approach to achieve the deliverables/ expected outputs within the specified timeframes.	20%	
	C.	Familiarity with the ISO 9001:2015 Standards	10%	
	TOTAL			100%

Hurdle rate for Technical Proposal: At least 85%

The research 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:

Proposal	Weight (%)
Technical	85
Financial	15
TOTAL	100