

ANNEX A: TERMS OF REFERENCE (TOR)

PROCUREMENT OF THE SERVICES OF A RESEARCH COMPANY TO CONDUCT THE 2024 TPB CUSTOMER SATISFACTION SURVEY (CSS) / CLIENT SATISFACTION MEASUREMENT (CSM)

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.

However, in 2023, the GCG and the Anti-Red Tape Authority (ARTA) released the Joint Memorandum Circular No. 1, which aims to harmonize the conduct of the GCG-prescribed Customer Satisfaction Survey and the ARTA's Client Satisfaction Measurement (CSM). Now called 'Harmonized CSM', the survey shall be administered to clients who availed of TPB's services as defined in the Citizen's Charter.

GOVERNING GUIDELINES IN THE CONDUCT OF CSS/CSM:

1. Joint Memorandum Circular No. 1 of the GCG and the Anti-Red Tape Authority (ARTA) about the *Harmonized Client Satisfaction Measurement (CSM)*;
2. ARTA's Memorandum Circular No. 2022-05 with the subject *Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement*;
3. ARTA's Memorandum Circular No. 2023-05 with the subject *Amendment to ARTA Memorandum Circular No. 2022-05*

TARGET RESPONDENTS:

All clients who availed of TPB's external and internal services as defined in the agency's Citizen's Charter:

	List of Services
Internal Services	Process of Payroll
	Processing of Claims and Payments
	Request for Certification and Service Record
	Recruitment, Selection, and Promotion Procedure
	Request for Certificate of No Pending/With Pending Administrative Case
External Services	TPB Membership Program

Note: *The list of services is subject to change/revision depending on the prevailing Citizen's Charter of the TPB in 2024.*

SURVEY METHODOLOGY & SAMPLE SIZE:

The minimum number of responses shall be computed based on the calculator prescribed in the ARTA Memorandum Circular No. 2022-05:

<https://tinyurl.com/CSMsamplesize>

where: Confidence Interval = 95%
Margin of Error = 5%

Even after meeting the minimum number of respondents before the end of the year, the Customer Satisfaction Survey / Client Satisfaction Measurement (CSM) shall be administered until December 2024. The sample size will be finalized during the preparation of the Inception Report.

Data Gathering Method: Online Survey Tool or Platform

SCOPE OF WORK:

- a. Finalize the sample size per defined service.
- b. Use the ARTA-prescribed CSM questionnaire. Service specific questions can be added to the questionnaire subject to the approval of TPB.
- c. Ensure that the minimum number of respondents is met.
Recruitment of respondents: Contact details will be provided by TPB after signing of the Data Outsourcing Agreement.
- d. Send the CSM Questionnaire to the TPB clients and follow up the accomplishment of the form.
- e. Provide tokens for the survey respondents.

- f. Adhere to the guidelines for conducting the CSM as indicated in the Joint Memorandum Circular No. 1 of GCG and ARTA, ARTA Memorandum Circular No. 2022-05, and ARTA Memorandum Circular No. 2023-05.
- g. Analyze the survey results with the minimum required information as follows:
 - i. Scope and Data Gathering Methodology (i.e. sampling procedure, mode of survey implementation, feedback and collection mechanism, scoring system, interpretation of numerical results)
 - ii. Response rates and total number of transacting clients during the period
 - iii. Client Demographic
 - iv. Citizens' Charter results
 - v. Service Quality Dimension results
 - vi. Average Score of the Service
 - vii. Free responses, inputs, and recommendations from respondents
- h. Assist in crafting the Continuous Agency Improvement Plan for the following year (as required in the CSM Report, in coordination with the TPB Committee on Anti Red Tape)

Deliverables:

- a. Inception Report
- b. Reviewed and updated CSM questionnaire
- c. Quarterly Monitoring Reports
- d. Draft CSM Report on findings, analyses and agency improvement plan
- e. Final CSM Report (3 hard copies and digital format)
 - ✓ Full report on findings, analysis, and recommendations
 - ✓ Conclusions and improvement plan to address survey findings
 - ✓ Tabulation of aggregate data (excel format)
 - ✓ Sample accomplished survey forms
- f. Presentation of the Comprehensive Final Report (ppt) to the TPB Management Committee (MANCOM)

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
01 April 2024	Kick-Off Meeting between the research company and TPB representatives
05 April 2024	Submission of the Inception Report and updated CSM Questionnaire

Date	Activities/ Deliverables
08-19 April 2024	Review, revision, and finalization of the Inception Report and CSM Questionnaire
22-26 April 2024	Pilot-testing of the CSM Questionnaire
02 May 2024	Submission of Pilot-testing results
03 May – 27 December 2024	Data collection proper
15 July 2024	Submission of the Quarterly Monitoring Report (Q2)
15 October 2024	Submission of the Quarterly Monitoring Report (Q3)
15 January 2025	Submission of the Quarterly Monitoring Report (Q4)
24 January 2025	Submission of the Draft CSM Report- 1 st draft
07 February 2025	Submission of the Draft CSM Report- 2 nd draft
21 February 2025	Submission of the Final CSM Report (in hardcopies and digital format)
07 March 2025	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.

APPROVED BUDGET FOR THE CONTRACT (ABC):

The project shall be undertaken for the amount of **One Million Five Hundred Thousand Pesos (Php 1,500,000.00)** inclusive of value-added tax (VAT) and other applicable taxes and fees.

QUALIFICATION 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 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.*

- Overall Project Manager
- Statistician
- Overall Field Manager
- Overall Data Processing Manager
- Data Processing Supervisor / Digital Operations Supervisor OR Encoding Supervisor

- 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*).

TERMS OF PAYMENT:

The indicative payment scheme is as follows:

OUTPUT/MILESTONE	% OF PAYMENT
Upon submission and approval of the inception report and finalized CSM questionnaire	15%
Upon submission and approval of the Quarterly Monitoring Reports (2 nd to 4 th Quarters)	30% <i>10% upon approval of each quarterly monitoring report</i>
Upon submission and approval of the Comprehensive CSM Report (in hardcopies and digital format)	45%
Upon presentation of the CSM Report (in powerpoint format) to the TPB Management Committee (MANCOM)	10%
TOTAL	100%

Note: *The research company should have a Landbank account. Payment shall be made through LBP bank deposit. Otherwise, bank charges shall 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%	
	<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%	

	PARTICULARS	PERCENTAGE	RATING
	<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>		
	<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 15 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		30%
	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>All key personnel have been involved in at least 2 research/ survey projects with government clients</i> <i>Overall Project Manager – 8%</i> <i>Statistician – 7%</i> <i>Overall Field Manager – 5%</i> <i>Overall Data Processing Manager – 5%</i> <i>Data Processing Supervisor / Digital Operations Supervisor OR Encoding Supervisor – 5%</i>		
II.	Research Company’s Experience and Capability		30%
	A. Quantity of similar surveys handled.	15%	
	<i>With more than 3 similar surveys (15%)</i>		
	<i>With 3 similar surveys (10%)</i>		
	<i>Less than 3 similar surveys (0%)</i>		
	B. Quality / profile of previous clients in similar projects.	15%	
	<i>Has worked with at least 2 government clients, with 1 government client under GCG (15%)</i>		
	<i>Has worked with at least 2 government clients (10%)</i>		
	<i>Has worked with at least 1 government client (5%)</i>		
	<i>No previous government client (0%)</i>		
III.	Plan of Approach and Methodology		40%
	A. Consistency of the proposed workplans with the standard guidelines of ARTA	15%	
	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%	
	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