

Terms of Reference

Consulting Services for the Development and Implementation of a Stakeholder Engagement, Communication, and Research Results Dissemination Strategy for the National Long-Term Vision

I. Background and Rationale

The National Economic and Development Authority (NEDA) is currently developing a long-term vision (LTV) for the Philippines and the Filipino people, which is intended to be a basis of unity among Filipinos and a guide for development planning across administrations, as well as for international development assistance for the next 25 years. It is also envisioned to be a useful reference that should influence electoral platforms and that should be able to set the terms of debate in 2016 and beyond.

The national long-term vision intends to help successive administrations remain focused on the country's long-term goals, even as they respond to short- and medium-term needs and conditions. This can be achieved by ensuring that the national vision is genuinely owned by citizens who will reach their peak productive years between 2015 and 2040, and who will oblige government officials to stay on the course towards long-term development.

Stakeholder engagement, communication, and dissemination of research results will play a vital role in ensuring that the national vision (a) accurately represents the aspirations of Filipino citizens, particularly children, youth, and young adults; and (b) gains widespread and sustained awareness, recognition, and ownership.

Thus, the NEDA, through the Development Information Staff (DIS) and the National Policy and Planning Staff (NPPS), proposes to have a **stakeholder engagement, communication, and research results dissemination strategy** as a core component of the LTV project.

There will be a two (2)-pronged approach for engaging with stakeholders, communicating with the public, and disseminating the results of the long-term vision exercise: (a) structured or science-based methods of engagement, which include a national survey, focus group discussions (FGDs) and consultation/validation activities, and (b) public communication, which includes promotions/awareness-building, online engagement and advocacy through various channels.

This strategy will be implemented in two (2) phases: Phase 1 will coincide with the process of generating the national vision; thus, stakeholder engagement and communication activities will focus mainly on getting the perspectives of stakeholders and ensuring that their inputs are considered and incorporated in the LTV. Phase 2 will essentially be publicity and advocacy for the national vision generated in Phase 1 as a result of science-based engagement methods and technical research.

The first phase, to be implemented from September to December 2015, will focus mainly on engaging stakeholders, particularly the youth and young adults in setting the vision. The second phase, to be implemented starting in 2016, will focus on

communicating the national vision, and advocacy to create and sustain awareness, interest, and ownership.

All communication activities conducted during the process of setting and promoting the national LTV must be tied together with an overall branding concept and strategy. This will help ensure that all activities and outputs are connected in people's minds as components of a meaningful whole. In turn, this will help ensure that citizens not only recognize and remember the national vision, but see it as an integral part of their individual aspirations, motivations, and endeavors.

These Terms of Reference (TOR) pertain to the public communication component that will be implemented during Phase 1.

II. Objectives

During Phase 1, the public communication component will aim to:

1. Provide a visual, verbal, and conceptual identity for all activities and communication outputs related to the national LTV and ensure that succeeding activities will help build the national vision's brand image and identity; and
2. Engage stakeholders and communicate the national LTV consistently across platforms/channels and forms.

During Phase 2, the public communication component will aim to:

1. Publicize the long-term vision through various media channels/platforms; and
2. Advocate for its use by leaders, particularly by candidates, for electoral positions.

III. Target Audience

1. Youth and young adults (persons aged 14-40 years old)
2. Leaders and decision-makers

IV. Scope of Works

NEDA will hire the services of an Advertising Agency / Strategic Communications Firm to accomplish the following tasks:

1. **Conduct market research** on the campaign's target audience/s¹;
2. **Develop an overall concept and branding guidelines**, which will provide a visual, verbal, and conceptual identity for all stakeholder engagement activities and communication outputs related to the national LTV;
3. **Develop a creative communication strategy/plan** for engaging stakeholders and communicating the national LTV. The plan may include proposed activities and materials for both Phase 1 and Phase 2, as well as an implementation schedule and cost estimates; and

¹ NEDA will also provide available data from the initial and final results of the FGDs and survey.

4. **Implement Phase 1 communication activities and grand launch.** The firm shall be responsible for implementing Phase 1 communication activities (which will include online engagement, TV and audio-visual communications, and youth summit), as well as the grand launch of the main vision documents.

V. Deliverables

1. **Inception report/work plan** detailing the activities and specific tasks to be undertaken by the Advertising Agency / Strategic Communications Firm in fulfilling the project's scope of works
2. **Overall concept and branding guidelines** for communicating the national LTV, which shall include the following:
 - (a) Results/insights from the market research;
 - (b) Campaign brand name;
 - (c) Campaign logo;
 - (d) Campaign tagline; and
 - (e) Branding guidelines
3. **Communication plan/strategy** focusing on stakeholder engagement in Phase 1 and on publicity in Phase 2. The communication plan should include concepts for the following:
 - (a) Phase 1 (for implementation in 2015)
 - i. Online engagement (web, social media, blogs, etc.) data gathered from these channels may be part of the validation exercises of the visioning results;
 - ii. Tri-media, particularly television²;
 - iii. Youth summit or other events; and
 - iv. Other components that will help achieve the campaign objectives
 - (b) Phase 2 (for implementation in 2016)
 - i. Grand launch and other events;
 - ii. Tri-media particularly television³;
 - iii. Online engagement; and
 - iv. Other components that will help achieve the campaign objectives
4. **Implementation strategy** for Phase 1 activities and grand launch event
5. **Monitoring and evaluation (M&E) system** in the form of proprietary metrics in gauging the implementation of the above plan, with regular and timely status update mechanism

² TV placements or programs must be aired during timeslots with high youth viewership, with frequency adequate to reach majority of the target audience.

³ TV placements or programs must be aired during timeslots with high youth viewership, with frequency adequate to reach majority of the target audience.

6. Terminal Report with assessment/evaluation of effectivity of entire campaign

VI. Responsibilities of the Advertising Agency / Strategic Communications Firm

The Advertising Agency / Strategic Communications Firm shall assume the following obligations:

1. The Agency/Firm shall designate one (1) project coordinator to ensure timely delivery of outputs and to coordinate with the NEDA in carrying out the services;
2. The Agency/Firm shall provide creative direction for the national LTV communication campaign;
3. The Agency/Firm shall provide necessary manpower, facilities and production equipment, and conduct all necessary preparatory and other activities to accomplish the agreed scope of works and deliverables, i.e., conduct of market research; development of an overall concept and branding guidelines; development of a creative communication strategy/plan; and implementation of Phase 1 communication activities and grand launch. Any additional costs incurred relative to any aspect of the campaign shall be solely charged to the service provider;
4. The Agency/Firm shall meet with NEDA at least twice a month during project duration to discuss activities, issues and concerns related to the national LTV communication campaign;
5. The Agency/Firm shall attend meetings/events/seminars/activities that may provide insights useful to the project; and
6. The Agency/Firm shall submit reports detailing work progress, issues and concerns, and recommended next steps in relation to the project at no additional cost to NEDA.

VII. Responsibilities of NEDA

The NEDA shall assume the following obligations:

1. The NEDA shall provide all information and materials needed to accomplish the scope of works, including preliminary and final results of the FGDs, survey, and thematic papers, among others;
2. The NEDA shall be responsible for the review and approval of all materials and deliverables produced by the Advertising Agency / Strategic Communications Firm; and
3. The NEDA shall provide up to four (4) support staffs to assist and coordinate with the Advertising Agency / Strategic Communications Firm.

VIII. Qualifications of the Advertising Agency / Strategic Communications Firm

1. The Agency/Firm must be an advertising agency or strategic communication firm with the required personnel and staffs to develop and implement the overall branding and communication strategy. It must be duly established in the Philippines and may have tie-up or joint venture (JV) arrangements with a market research agency, media placement agency and/or production company;
2. The Agency/Firm, and its partner/s, must have been in existence for at least five (5) years and must have undertaken similar advocacy campaigns engaging the youth through various media platforms/channels within the last five (5) years, with an aggregate cost of at least 50 percent of the Approved Budget for the Contract (ABC) for this procurement activity. Impact of said advocacies or campaigns must be demonstrated through appropriate metrics set by the client (sales performance, number of inquiries, web traffic, social media engagement, etc.) or client feedback; and
3. Proofs of the similar advocacy campaigns undertaken by the Advertising Agency / Strategic Communications Firm within the last five (5) years should be submitted together with the proposal, including the appropriate metrics or client feedback.

Other qualifications are stated in the Bidding Documents.

IX. Project Duration and Budget

Project activities will commence in September 2015 with the development of the overall concept, branding guide and communication plan, and end in January 2016 with the grand launch of the main vision documents.

The ABC for the consulting services under this TOR is ***EIGHTEEN MILLION THREE HUNDRED THOUSAND and 00/100 PESOS (PhP18,300,000.00)***, inclusive of all applicable Government taxes and charges.

The succeeding phases of the campaign from February 2016 onwards will be implemented under a separate TOR and contract.

X. Mode of Procurement

The procurement of the service provider shall be through competitive public bidding pursuant to Republic Act (RA) No. 9184, or the Government Procurement Reform Act (GPRA), and its Revised Implementing Rules and Regulations (IRR).

XI. Timelines

The following are the proposed timelines for the accomplishment of work and submission of deliverables:

Key Tasks/Deliverables	Indicative Timelines
Submit inception report/work plan	Within seven (7) calendar

	days from receipt of the Notice to Proceed (NTP)
Conduct market research	Within seven (7) to 14 calendar days from receipt of NTP
Develop overall concept and branding guidelines	Within 21 calendar days from approval of the work plan
Develop communication strategy, implementation plan for Phase 1, and M&E system	Within 21 calendar days from approval of overall concept and branding guidelines
Implement and monitor communication strategy/plan	Upon approval of the communication strategy, implementation plan, and M&E system
Grand launch of LTV documents	Within January 2016
Submit terminal report	Within February 2016

XII. Milestones / Payment Schedule

Payments to the Advertising Agency / Strategic Communications Firm shall be made in accordance with the schedule below and subject to the usual Government accounting and auditing requirements. Deliverables/Activities 2-5 shall be submitted to NEDA by the Agency/Firm in two (2) hard copies for payment processing and records purposes⁴. An electronic/soft copy shall also be submitted to NEDA.

Activity	Payment
Upon acceptance of inception report	40%
Upon acceptance of overall concept and branding guidelines	30%
Upon acceptance of communication plan/strategy	20%
Upon acceptance of terminal report	10%

An advance payment equivalent to ten (10) percent of the ABC may be made which shall cover the cost of mobilization subject to posting of an irrevocable standby letter

⁴ One (1) copy of each of the reports shall be submitted to the NEDA Financial, Planning and Management Staff (FPMS) for payment purposes. The other copy shall be retained by the DIS for its records.

of credit issued by an entity acceptable to NEDA and of an amount equal to the advance payment. The advance payment shall be repaid by the Advertising Agency / Strategic Communications Firm by deducting from its subsequent payments such sum as will be agreed upon during contract negotiations until fully liquidated within the duration of the contract.

XIII. Submission of Proposals

Interested Advertising Agency / Strategic Communications Firm must purchase the Bidding Documents and submit proposals to the NEDA Bids and Awards Committee for Consulting Services (NBAC-CS).

A detailed proposal meeting the above requirements must be prepared and presented to the NBAC-CS. The proposal must be divided into a technical portion and a financial portion, which will be submitted in separate, sealed envelopes, in accordance with the specifications set in the Bidding Documents.

The ***Technical Proposal*** must include the following:

1. Accomplished, signed and duly notarized Bidder Assessment Form (see attached);
2. Campaign proposal, with brief discussions on the following components:
 - (a) Initial analysis of target audience;
 - (b) Proposed concept;
 - (c) Proposed communication plan and strategy;
 - (d) Proposed implementation strategy; and
 - (e) Proposed monitoring and evaluation system; and
3. Other documentary requirements as specified in the Bidding Documents.

The ***Financial Proposal*** must include the following:

1. Detailed breakdown of proposed expenses, including personnel expenses, production costs, media placement costs, and other costs; and
2. Other documentary requirements as specified in the Bidding Documents.

Proposals submitted by qualified bidders will undergo a Quality-Based Selection/Evaluation (QBS/QBE) procedure, as detailed in the Revised IRR of RA 9184, or GPRA.

XIV. Selection Process and Criteria

Candidates will be shortlisted based on the following criteria:

1. Track record:
 - (a) Number of years in the advertising business;
 - (b) List of top ten (10) clients (in terms of total value of advertising contracts);
 - (c) Average number of years that the firm was engaged/employed by clients;

- (d) Previous experience in the conduct of youth advocacy campaign;
 - (e) Demonstrated impact of said youth advocacy campaign; and
 - (f) Awards received;
2. Qualifications of key personnel:
- (a) President, Chief Executive Officer (CEO), or equivalent;
 - (b) Account Director, or equivalent; and
 - (c) Creative Director, or equivalent; and
3. Financial capacity:
- (a) Net current assets (in PhP Million);
 - (b) Net current liabilities (in PhP Million); and
 - (c) Total approximate value of ongoing and committed projects from September to October 2015 (in PhP Million).

Shortlisted candidates will then be requested to present/pitch their creative proposals within 15 calendar days after the deadline for submission of proposals pursuant to Section 33.2.2 of the Revised IRR of RA 9184. The creative brief/pitch must provide a comprehensive discussion of the proposed campaign, including the following components:

- 1. Initial analysis of target audience;
- 2. Proposed concept and possible executions;
- 3. Proposed communication plan and strategy;
- 4. Proposed implementation strategy; and
- 5. Proposed monitoring and evaluation system.

Proposals and creative briefs will be evaluated based on the following criteria:

- 1. Responsiveness of proposed campaign to overall goals of the LTV project;
- 2. Responsiveness of proposed campaign to the needs and preferences of the target audience;
- 3. Use of creative methods to engage the target audience;
- 4. Use of innovative methods to engage the target audience;
- 5. Use of a variety of communication and/or media channels; and
- 6. Achievability of campaign within the timeframe.

After all creative proposals have been presented by the shortlisted candidates, the NBAC-CS will then review the financial proposals as to their compliance with the ABC set for this undertaking.

XV. Ownership

All materials conceptualized, designed and produced shall be owned by NEDA with full and exclusive rights on future use thereof both in the Philippines and internationally.

XVI. Retention Payment

A retention payment of ten (10) percent shall be withheld. It shall be based on the total amount due to the Advertising Agency / Communications Firm prior to any deduction and shall be retained from every progress payment until 50 percent of the value of the Communication Plan, as determined by NEDA, is completed. If, after 50 percent completion, the Communication Plan is satisfactorily done and on schedule, no additional retention shall be made; otherwise, the ten (10) percent retention shall be imposed.

The total “retention money” shall be due for release upon approval of the Terminal Report. The Advertising Agency / Communications Firm may, however, request the substitution of the retention money for each progress billing with irrevocable standby letters of credit from a commercial bank, bank guarantees, or surety bonds callable on demand, of amounts equivalent to the retention money substituted for and acceptable to NEDA, provided that the project is on schedule and is satisfactorily undertaken. Otherwise, the ten (10) percent retention shall be made. Said irrevocable standby letters of credit, bank guarantees and/or surety bonds, to be posted in favor of NEDA shall be valid for the duration of the contract.

XVII. Penalties and Liquidated Damages

The selected Advertising Agency / Communications Firm shall be subjected to assessment by NEDA as to the effectivity of any phase of the campaign.

Segments or phase(s) of the Plan not implemented for whatever reason shall be revised or modified by the media agency at no cost on the part of NEDA for the purpose of translating said segment or phase(s) for future implementation.

Where the Advertising Agency / Communications Firm refuses or fails to satisfactorily complete the work within the specified contract time, plus any time extension duly granted and is hereby in default under the contract, the Advertising Agency / Communications Firm shall pay NEDA for liquidated damages, and not by way of penalty, an amount, as provided in the conditions of contract, equal to at least one tenth (1/10) of one (1) percent of the cost of the unperformed portion of the works for every day of delay. Should the amount of liquidated damages reach 10 percent of the contract amount, NEDA shall at its own discretion terminate the contract without prejudice to any further action it may take to recover whatever losses incurred due to non-performance of the Advertising Agency / Communications Firm.

To be entitled to such liquidated damages, NEDA does not have to prove that it has incurred actual damages. Such amount shall be deducted from any money due or which may become due the Advertising Agency / Communications Firm under the contract and/or collect such liquidated damages from the retention money or other securities posted by the Advertising Agency / Communications Firm whichever is convenient to NEDA.