

TERMS OF REFERENCE

Consulting Services for the Planning and Event Management of a Multi-Stakeholder Assembly/Summit cum Press Briefing for the National Long-Term Vision (AmBisyon Natin 2040)

I. Background and Rationale

The National Economic and Development Authority (NEDA) is developing a long-term vision for the Philippines and the Filipino people, which is intended to be a basis of unity among Filipinos, an anchor for development planning across administrations, and a guide for engaging with our international development assistance for the next 25 years.

The national long-term vision (LTV) 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.

NEDA has been undertaking stakeholder engagement and communication activities that will ensure that the national vision accurately represents the aspirations of Filipino citizens, particularly children, youth and young adults. These must be followed by research dissemination and communication activities that will then promote widespread public awareness, recognition and ownership of the national long-term vision.

Thus, the NEDA - Development Information Staff (DIS) proposes to publicize the long-term vision documents through a multi-stakeholder assembly/summit cum press briefing. The event will mark the beginning of Phase 2 - publicity, advocacy and stakeholder engagement activities for the national vision. This phase will focus on sustaining awareness, interest in, and ownership of the national vision. In this phase, NEDA will also be engaging stakeholders on the milestones and the strategies to realize the vision in time for the preparation of the next six (6)-year Philippine Development Plan (PDP).

To maximize the impact of the activity and ensure cost-effectiveness, DIS intends to engage a professional events organizing firm to handle the event. In order to ensure consistency with the overall brand concept and strategy of the national LTV, the events organizing firm is required to closely coordinate with the advertising agency hired for the Phase 1 communication activities, and to adhere to the branding guidelines of the national LTV campaign.

II. Objectives

The multi-stakeholder assembly/summit cum press briefing aims to serve as the mainstream culminating event of the LTV campaign that will feature all the products and materials created during the process of developing the vision. Specifically, the assembly/summit cum press briefing aims to:

- A. Generate greater public awareness of and interest in the national LTV;

- B. Promote attendees' and public understanding of key points of the national LTV; and,
- C. Create a strong positive impression on the national LTV so as to increase chances of sustaining interest after the event.

III. Target Participants

The event will be targeting the following participants:

- A. Government, business, academe, civil society leaders and decision-makers;
- B. Youth leaders;
- C. Opinion leaders/celebrities; and,
- D. Columnists and beat reporters.

IV. Scope of Works

NEDA will engage the services of an events organizing firm to accomplish the following tasks:

A. Event Planning and Coordination

- 1. Submit an event plan that is informed by the project brief and creative direction provided in this document;
- 2. Revise the event plan as needed, based on the comments of NEDA; and,
- 3. Handle all logistical and administrative requirements in the preparation and conduct of the event. These include, but are not limited to, the procurement and coordination with vendors/suppliers for each event component, as needed:
 - a. Staging and Production Design;
 - b. Technical Requirements such as sounds, lights, LED screens, communications equipment;
 - c. Audio Visual Presentations (AVPs) Production;
 - d. Entertainment;
 - e. Host;
 - f. Ingress and Egress operations; and,
 - g. Venue and Food for 500 guaranteed participants.

B. Guests and Event Management

- 1. Provide an online pre-registration and an onsite registration facility, including ten (10) registration personnel;
- 2. Prepare and compile participants' register, with complete information;
- 3. Provide, arrange, and supervise ten (10) ushers;
- 4. Coordinate with the security staff of the venue for ensuring the safety and security needs of VIPs;
- 5. Ensure that all technical requirements for the event are acquired, available, and properly working;
- 6. Conduct a dry run at least one day before the event;
- 7. Run the event based on the approved event plan by NEDA; and,
- 8. Troubleshoot any event-related issue or problem that may arise.

C. Event Coverage and Documentation

1. Carry out photo, audio, and video documentation;
2. Provide a live feed system for the event venue; and,
3. Create and submit a photo bank of the event that contains high-resolution images and raw files.

D. Production of AVPs

1. Develop a concept, script, and story board for a 2-3 minute mood setter/opening video;
2. Revise the concept, script, and story board as needed, based on the comments of NEDA;
3. Submit final plan and timeline of AVP production based on the concept and story that is approved by NEDA;
4. Schedule filming and interview shoots with select people and officials, as needed, in coordination with and as approved by NEDA;
5. Carry out all creative works necessary to produce the approved AVP script;
6. Present draft opening video for comments and approval by NEDA; and,
7. Produce and submit a total of three (3) final AVPs, all in DVDs:
 - a. One (1) 2- to 3-minute length mood setter/opening video;
 - b. One (1) video of event highlights; and,
 - c. One (1) documentation video of the entire event.

V. Creative Direction for both the Event and the Mood Setter/Opening Video

- A. Present the long-term vision as the anchor for development planning until 2040:
1. The LTV is the vision and ambition of the Filipino people, particularly the youth, for their generation and their next generations.
 2. The LTV is the documentation of the Filipinos' aspirations for their selves, their families, friends, and for their country.
 3. The LTV serves as a guide on how to achieve these goals/aspirations/ambitions of the Filipinos.
- B. Both need to have a youthful vibe or must appeal to the youth as they are the major stakeholders of the LTV.
- C. Both must inspire unity among Filipinos. They are represented by attendees from various sectors of society – children, youth, fisher folks, farmers, formal and informal workers, indigenous peoples, persons with disabilities, disaster/calamity victims, government, and development organizations.

VI. Venue Rental and Food

The events organizing firm should be able to secure a service provider (subject to the approval of NEDA) that will provide the venue, facilities and food on 22 July 2016, 9:00 AM – 5:00 PM, including a maximum of 24 hours of ingress/set-up time prior to the event proper.

The specifications are as follows:

A. Venue

1. The event shall be held in a large venue that has historical relevance and value and must be located in a major city in the country;
2. The venue/service provider must also have an excellent track record for hosting big, high-level events;
3. The venue service provider must have extensive experience in handling/coordinating the security of high-level officials such as the President of the Republic of the Philippines;
4. The venue must have adequate light and sounds equipment, furniture, parking space and comfort rooms;
5. The venue must provide complimentary parking space for resource speakers and organizers; and,
6. The venue must be able to provide free wifi access.

B. Function Rooms

The venue/service provider must be able to provide the following:

Hall for Grand Launch

1. One (1) air-conditioned, high-ceilinged hall for the Grand Launch that can accommodate 500 participants; round tables;
2. A maximum of 24 hours ingress/set-up time for the events management firm prior to the event proper on 22 July 2016;
3. A spacious area in front of the Hall for the set-up of registration and secretariat, with tables and chairs for the secretariat and registration team;
4. Audio-visual equipment: basic lights and sound system, at least six (6) microphones; and,
5. Lobby directional signage.

Press Briefing Room

1. One (1) air-conditioned room that can accommodate 50 people, with ample room for set up of camera equipment of press; classroom set-up. Half-day (PM) use only, but must provide for at least two (2) hours of set-up time before actual use;
2. Audio-visual equipment: basic lights and sound system, at least four (4) microphones; and,
3. Lobby directional signage.

C. Food

1. AM and PM snacks (consisting of, but not limited to)
 - a. Filipino-themed snacks;
 - b. Dessert-type snacks;
 - c. One round of cold drink (juice or iced tea);
 - d. Free-flowing coffee and tea; and,
 - e. Mineral water;
2. Buffet lunch (consisting of, but not limited to)
 - a. Salads;

- b. Appetizers;
 - c. Soup;
 - d. Pasta;
 - e. Beef;
 - f. Chicken;
 - g. Pork;
 - h. Vegetables;
 - i. Seafood;
 - j. Steamed Rice;
 - k. Dessert (Assorted fruits, cakes, and gelatin/chocolate fountain)
 - l. One round cold drink (juice or iced tea);
 - m. Free-flowing coffee and tea; and,
 - n. Mineral water;
- 3. At least 18 servers in uniform for the general participants; and,
 - 4. Detailed servers in uniform for VIPs.

D. Other Services

- 1. Engineering Services;
- 2. Maintenance Staff Support;
- 3. Security Support; and,
- 4. Government discount on room rental.

VII. Deliverables

- A. Inception Report/Work Plan detailing the activities and specific tasks to be undertaken by the events management firm in fulfilling the scope of work;
- B. Event Plan, inclusive of, but not limited to, the following:
 - 1. Event concept;
 - 2. Program;
 - 3. Theme and décor/ production design;
 - 4. AVP (mood setter/opening video) concept, storyboard, and script;
 - 5. Suppliers;
 - 6. Venue and food;
 - 7. Production schedule/timeline;
 - 8. Detailed budget breakdown; and,
 - 9. Security and contingency plan;
- C. AVP Production Plan for the 2-3 minute mood setter/opening video, inclusive of the following:
 - 1. Concept for the mood setter/opening video;
 - 2. Storyboard;
 - 3. Script, if needed;
 - 4. Production schedules for both the mood setter/opening AVP, the event highlights, and full event documentation video;
 - 5. Itinerary of field shoots, if needed; and,
 - 6. Detailed budget breakdown;

- D. Signed contract for the venue, catering and related services;
- E. Final mood setter/opening video, to be shown at the beginning of the event;
- F. Management and coordination of activities prior, during, and after the event proper;
- G. Video of the event highlights, full event documentation video, photo bank, all in DVDs; and,
- H. Terminal Report with assessment/evaluation of the event and database of participants.

VIII. Responsibilities of the Events Organizing Firm

The events organizing firm shall assume the following obligations:

- A. Designate one (1) project coordinator to ensure the timely delivery of outputs and to coordinate with NEDA, through DIS, in carrying out the consulting services;
- B. Ensure consistency with the overall LTV communication campaign;
- C. Provide and shoulder all costs of necessary manpower, facilities, production equipment, set-up, venue and food, and conduct all necessary preparatory and other activities to accomplish the agreed scope of work and deliverables, i.e., event planning and coordination and AVP production. Any additional costs incurred relative to any aspect of the campaign shall be solely charged to the events organizing firm;
- D. Meet regularly with NEDA during project duration to discuss activities, issues, and other concerns related to the multi-stakeholder assembly/summit cum press briefing;
- E. Submit reports detailing work progress, issues and concerns, and recommended next steps in relation to the project at no additional cost to NEDA; and,
- F. Execute a notarized non-disclosure or confidentiality agreement with NEDA to ensure the confidentiality of all information and materials the events organizing firm receive from the Agency.

IX. Responsibilities of NEDA

NEDA shall assume the following obligations:

- A. Provide all information and materials needed to accomplish the scope of work, including branding guidelines, preliminary manuscript¹, list of invitees, among others;
- B. Review and approve all materials and deliverables produced by the events management firm; and,
- C. Provide at least four (4) support staffs to assist and coordinate with the events management firm.

X. Qualifications and Eligibility Requirements

The events management firm must possess the following qualifications:

- A. Must be an events organizing firm with the required personnel and staff to plan and implement the multi-stakeholder assembly/summit cum press briefing. The events management firm must be duly established in the Philippines and may have tie-up

¹ Events organizing firms must ensure confidentiality of all information and documents provided to them by NEDA. Such information and documents may not be used for any other purpose aside from the planning and conduct of the event.

or joint venture arrangements with a public relations agency and production company, among others; and,

- B. The events management firm and its partner/s must have been in existence for at least five (5) years, and must have undertaken a similar activity 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. Proof/s of the similar launch activity undertaken by the firm within the last five (5) years should be submitted together with the proposal, including the appropriate metrics (i.e., sales performance, client feedback, etc.).

Prospective bidders/proponents shall be required to submit the following eligibility requirements/documents:

A. Class “A” Documents

Legal Documents

1. Registration certification from the Securities and Exchange Commission (SEC), Department of Trade and Industry (DTI) for sole proprietorship, or Cooperative Development Authority (CDA) for cooperatives, or any proof of such registration;
2. Valid Mayor’s permit issued by the city or municipality where the principal place of business of the prospective bidder is located; and,
3. Valid Tax Clearance Certificate per Executive Order (EO) No. 398, Series of 2005, reviewed and approved by the Bureau of Internal Revenue (BIR).

Technical Documents

1. Statement of the prospective bidder/proponent of all its ongoing and completed government and private contracts (properly labeled), including contracts awarded but not yet started, if any, whether similar, relevant or not similar/relevant in nature and complexity to the contract to be bid as defined in the Eligibility Data Sheet (EDS), within the relevant period of the contracts;
2. Statement specifying the bidder’s/proponent’s nationality and confirming that those who will actually perform the services are registered professionals authorized by the appropriate regulatory body to practice their respective professions and allied professions, including their respective updated Curricula Vitae (CVs) that show at least the following information:
 - a. Educational background;
 - b. Relevant work experience in events management and/or public relations (in months and years with detailed description/discussion on the nature and scope of works/services rendered); and,
 - c. Current workload.

Financial Documents

The events organizing firm’s audited financial statements, showing, among others, its total and current assets and liabilities, stamped “received” by the BIR, or its duly

accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of submission of proposals.

B. Class “B” Documents

Valid Joint Venture Agreement (JVA), in case a JV is already in existence. In the absence of a JVA, duly notarized statements from all the potential JV partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful, shall be included in the bid/proposal. Failure to enter into a JV in the event of a contract award shall be ground for the forfeiture of the Bid/Proposal Security. Each JV partner shall submit the legal Eligibility Documents. The submission of Technical and Financial Documents by any of the JV partners constitutes compliance.

XI. Project Duration and Budget

Project activities will commence not earlier than May 2016 with the development of the overall Concept and Event Plan, and end within one (1) month from the submission and acceptance of the Terminal Report, which should be completed within two (2) months from the actual conduct of the event.

The ABC is **Four Million and 00/100 Pesos (PhP4,000,000.00)**, inclusive of all applicable government taxes and service charges, broken down as follows:

A. Events planning, management, documentation	PhP2,500,000.00
and AVP production	
B. Venue and Food (Reimbursable)	<u>1,500,000.00</u>
Total	PhP4,000,000.00

Billing for reimbursable items shall be requested based on actual expenses incurred and supported by official receipts/documents.

In the absence of official receipts/documents when claiming for reimbursable costs, the events organizing firm may also be allowed to submit a notarized certification of actual disbursements made.

XII. Mode of Procurement

The procurement of the Consulting Services for the Planning and Event Management of a Multi-Stakeholder Assembly/Summit cum Press Briefing for the National LTV shall be done through competitive public bidding/selection process.

XIII. Timelines

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

Key Tasks/Deliverables	Indicative Timelines
Secure final approval of overall concept, event, and AVP Production Plan	Within 14 working days from receipt of Notice to Proceed (NTP)

Secure final approval of mood setter/opening video	Within 15 working days from the approval of the AVP Production Plan
Conduct the multi-stakeholder assembly/summit cum press briefing	As decided upon by NEDA, within 60 working days from approval of overall Concept and Event Plan
Submit DVDs of three (3) final AVPs and the photo bank	Within 7 working days after the Event
Submit Terminal Report	Within 40 working days after the Event.

	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14	W 15
Revision/ approval of overall concept, event plan, AVP concept, story, script, and venue															
Produce AVP (mood setter/ opening video)															
Final revision/ approval of AVP															
Rollout of event plan (procurement of suppliers, talents, guest list, venue, etc.)															
Conduct the assembly/ summit cum press briefing															
Submit Terminal Report and															

- C. AVP Production Plan for the mood setter/opening video, inclusive of the following:
1. Concept;
 2. Storyboard;
 3. Script, if needed;
 4. Production schedule; and,
 5. Itinerary of field shoots, if needed; and,
- D. Other documentary requirements as specified in the Bidding Documents.

The Financial Proposal must include the following:

- A. Detailed breakdown of proposed expenses, including personnel expenses, production costs, supplier/vendor costs, and other costs; and,
- B. Other documentary requirements as specified in the Bidding/Proposal Documents.

Proposals will undergo a Quality-Based Evaluation/Selection (QBE/QBS) process, as detailed in the Revised Implementing Rules and Regulations (IRR) of Republic Act (RA) No. 9184 (See Annexes for Criteria to be used in the evaluation process).

XVI. Selection Process and Criteria

A maximum of five (5) firms will be shortlisted based on the following criteria:

- A. Track Record
1. Number of years in the events organizing business;
 2. List of top ten (10) clients (in terms of total value of contracts);
 3. Previous experience in the conduct of launch events;
 4. Demonstrated impact of said event/s; and,
 5. Awards received (if any);
- B. Qualifications of Key Personnel
1. President, CEO, or equivalent;
 2. Account Director or equivalent; and,
 3. Event Director/Manager or equivalent; and,
- C. Financial Capacity (FC)

$$FC = \left(\frac{A - L}{C} \right) * 100$$

where,

A= net current assets (in PhP million)

L= net current liabilities (in PhP million)

C= total value of ongoing and committed projects from June to July 2016
(in PhP million)

Shortlisted firms will be required to make an oral presentation of their respective event and AVP plans within 15 calendar days after the deadline for submission of proposals pursuant to Section 33.2.2 of the Revised IRR of RA 9184.

XVII. 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.

XVIII. Retention Payment

Progress payments are subject to retention of ten (1) percent referred to as the "Retention Money". Such retention shall be based on the total amount due to the events organizing firm prior to any deduction and shall be retained from every progress payment until 50 percent of the value of works, as determined by NEDA, are completed. If, after 50 percent completion, the work is satisfactorily done and on schedule, no additional retention shall be made; otherwise, the ten (10) percent retention shall be imposed.

XIX. Penalties and Liquidated Damages

The selected events organizing firm shall be subject to assessment by NEDA as to the effectivity of the event in meeting the objectives.

Where the events organizing 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 Agreement, the events organizing firm shall pay NEDA for liquidated damages, and not by way of penalty, an amount, as provided in the General 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 reaches ten (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 events organizing 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 events organizing firm under the Contract Agreement and/or collect such liquidated damages from the retention money or other securities posted by the events organizing firm, whichever is convenient to NEDA.

Annex A. Bidder's/Proponent's Assessment Form

BIDDER'S/PROPONENT'S ASSESSMENT FORM

As of _____

Information to be provided in this form is for assessment purposes only, and will be kept confidential by the NEDA Bids and Awards Committee for Consulting Services (NBAC-CS).

Form must be signed by the company's accounts director and its chief financial officer.

Project title: Planning and implementation of a grand launch and press briefing event for the National Long-Term Vision

Company name:	
Office address:	
Telephone number:	
Fax:	
Email :	
Website:	

A. TRACK RECORD

1. Number of years in the public relations, marketing, or events organizing business:
2. List of top 10 corporate, government, or organizational clients for the past 5 years (in terms of total value of contract/s). Bidder must have conducted at least one major event with each client in this list.

CLIENT'S NAME	TOTAL VALUE OF CONTRACT/S (in PhP)	EVENT/S CONDUCTED
a.		
b.		
c.		
d.		
e.		
f.		
g.		
h.		
i.		

3. Has your company received any awards in the past 5 years? Please list them below.

AWARD	YEAR RECEIVED	AWARD-GIVING BODY
a.		
b.		
c.		
d.		
e.		

(Please use additional sheets if necessary)

4. Has your company implemented any major corporate, government, or organizational launch events in the past 5 years? Please list them below.

EVENT TITLE AND BRIEF DESCRIPTION	CLIENT/PRODUCT	INCLUSIVE DATES	NUMBER OF PARTICIPANTS	TOTAL CONTRACT VALUE (in PhP)	EVENT OBJECTIVES	EVENT OUTCOMES/IMPACTS (Please indicate source of feedback/information on event impacts)
a.						
b.						
c.						
d.						
e.						

(Please use additional sheets if necessary)

B. KEY PERSONNEL

	FULL NAME	POSITION/TITLE	TOTAL NUMBER OF YEARS IN PUBLIC RELATIONS, MARKETING, OR EVENTS ORGANIZING	AREAS OF EXPERTISE	AWARDS RECEIVED, IF ANY (Please indicate name of award, year received, and award- giving body)
President, CEO, or equivalent					
Account Director or equivalent					
Event Director/Manager or equivalent					

(Please use additional sheets if necessary)

C. FINANCIAL CAPACITY*

Net Current Assets (in PhP)	Net Current Liabilities (in PhP)	Total value of ongoing and committed projects in March 2016 OR Total value of ongoing and committed projects for the year 2016 (in PhP)

*Please attach a copy of your company's latest financial statement.

We hereby certify that all information stated above are true and correct. We hereby authorize the National Economic and Development Authority (NEDA) to request supporting documents or written proof of information stated above, as needed.

Name and signature

Accounts Director

Date:

Name and signature

Chief Financial Officer

Date:

SUBSCRIBED AND SWORN to before me this ____ day of

_____.

(Person administering oath)