

## **Terms of Reference**

### ***Provision of Services for the Research Results Dissemination and Advocacy Strategy for the Adoption of the National Long-Term Vision (AmBisyon Natin 2040)***

#### **I. Background and Rationale**

The National Economic and Development Authority (NEDA) launched the 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.

The LTV is also envisioned as a useful reference that can help successive administrations remain focused on the country's long-term goals, even as they respond to short- and medium-term needs and conditions. By ensuring that the national vision is genuinely owned by citizens who will reach their peak productive years between 2015 and 2040, the government and its officials are steered on the course towards long-term development.

In formulating the LTV, NEDA has led the conduct of nationwide consultations through focus group discussions, online engagement, and a national survey research to determine the aspirations, values, and principles of the Filipino people. Along with these, technical studies were conducted on select thematic areas that will provide useful information and guidance on how the vision could be achieved.

Recognizing that stakeholder engagement, communication, and dissemination of research results will play a vital role in ensuring that the national vision gains widespread and sustained awareness, recognition and ownership, the NEDA, through the Development Information Staff (DIS), is implementing a research results dissemination and advocacy strategy for the adoption of the LTV through the *AmBisyon Natin 2040* campaign.

The first phase of the communication and stakeholder engagement which was implemented in the first semester of 2016, featured a launch event, youth summit, social media engagement and ad placements in government-owned billboards. Considering the long-term nature of the initiative and the risk of discontinuity, NEDA deems it necessary to sustain the campaign and broaden its reach through various media/platforms.

#### **II. Objective, Target Market, and Coverage**

The NEDA-DIS seeks to engage an experienced and reliable Strategic Communications Firm / Media Planning and Placement Agency / Advertising Agency (Service Provider) to design and execute a multi-media campaign plan that will disseminate research results and sustain interest in and ownership of *AmBisyon Natin 2040*.

The campaign intends to influence youth and young adults (persons aged 14-40 years old), as well as the country's leaders and decision makers through a nationwide undertaking across various media channels/platforms, including events.

### III. Scope of Services

The Service Provider shall provide the following services:

1. Following the *AmBisyon Natin 2040* branding guidelines and overall communication strategy, draw up a comprehensive media plan with cost estimates for six (6) months starting January 2017 covering all major media types, and recommend media plans/strategies for the second semester of 2017 until 2018;
2. Provide creative services covering design and production of campaign materials to be used in all media and other activities;
3. Implement advocacy/media plan through media buying and events management and coordination services for selected media for six (6) months starting January 2017;
4. Provide creative support for special projects to be initiated by NEDA that are related to the campaign; and,
5. Provide regular updates and feedback to NEDA on the effectiveness of the campaign through appropriate metrics and feedback generated.

### IV. Deliverables and Submission Schedule

OUTPUTS/DELIVERABLES	TIME FRAME
1. Inception report and work plan, which <ol style="list-style-type: none"> <li>a) sums up the service provider's understanding of the <i>Ambisyon Natin 2040</i> communication strategy, assesses its progress thus far, and describes how the service provider intends to achieve the specified communication objectives of <i>AmBisyon Natin 2040</i>; and</li> <li>b) specifies activities and tasks to be undertaken by the Service Provider in fulfilling the project's scope of services and achieving the communication objectives.</li> </ol>	Within one (1) month from receipt of the Notice to Proceed (NTP)
2) Detailed media plan for January to June 2017 and recommended media strategies for the second semester of 2017 until 2018. <ol style="list-style-type: none"> <li>a) The detailed plan for January to June 2017 should include the following:               <ol style="list-style-type: none"> <li>i) <i>AmBisyon Natin 2040</i> overarching direction and key messages, which should be based on long-term vision research results and linked with other initiatives such as the Sustainable Development Goals and the next Philippine Development Plan</li> <li>ii) stakeholder and audience maps, positioning and programs and priorities for action;</li> <li>iii) Proposed activities and materials for specified target audiences (should include sample concepts for materials);</li> <li>iv) Implementation schedule; and</li> </ol> </li> </ol>	Within 1-2 months from receipt of NTP

OUTPUTS/DELIVERABLES	TIME FRAME
v) Cost estimates for six (6) months starting January 2017, covering all major media types and activities with wide reach and high relevance. b) The strategies for the second semester of 2017 until 2018 should build on the first semester 2017 plan and anticipate new developments.	
3) Concepts and production of materials for dissemination and/or activities across identified media/platforms in the approved media plan/strategy, subject to approval of the NEDA.	Upon approval of the media plan/strategy (Within 2nd – 5th month of engagement)
4) Media buying and coordination services for selected media based on approved media plan/strategy for the six-month engagement period. This shall include coordination and negotiation for media rates, spots, bonuses, etc., inclusive of all agency service fees.	Upon approval of the media plan/strategy (Within 3rd – 5th month of engagement)
5) Monthly monitoring reports gauging the implementation of the approved plan, including regular and as-needed status updates to NEDA that will allow for timely interventions.	Within 1 (one) month after start of media plan implementation, or more often, as needed
6) Compilation of data/information and multi-media materials such as videos, audio recordings, and/or photographs made, collected, reviewed, validated, and analyzed in relation to the project.	Within 6th month of engagement
7) Terminal Report with assessment/evaluation of the effectiveness of the entire campaign and recommended adjustments, if needed for the second semester of 2017 until 2018.	Within last week of engagement

## V. Responsibilities of the Service Provider

The Service Provider shall:

1. Designate at least one (1) project coordinator to ensure timely delivery of outputs and to coordinate with the NEDA in carrying out the required services;
2. Provide creative direction for the research results dissemination and advocacy strategy of *AmBisyon Natin 2040*;
3. Provide necessary manpower, facilities and production equipment, and conduct all necessary preparatory and other activities to accomplish the agreed scope of works and deliverables, as specified in Sections III and IV above. Any additional costs incurred relative to any aspect of the campaign shall be solely charged to the service provider;
4. Meet with NEDA at least twice a month during project duration to discuss activities, issues and concerns related to the *AmBisyon Natin 2040* campaign;
5. Attend meetings/events/seminars/activities that may provide insights useful to the project;
6. Submit reports detailing work progress, issues and concerns, and recommended next steps in relation to the project at no additional cost to NEDA;

7. Turn over all raw and finished materials in a one (1) terabyte portable external hard drive to NEDA which shall remain the sole and exclusive property of NEDA; and,
8. Be required to sign a Confidentiality and Non-Disclosure Agreement (CNDA) upon receipt of the Notice of Award (NOA).

## **VI. Responsibilities of NEDA**

The NEDA shall:

1. Provide all information and materials needed to accomplish the scope of work, including the LTV survey and FGDs' results, thematic papers, *AmBisyon Natin 2040* branding guidelines, among others once the Service Provider has signed a CNDA;
2. Provide up to four (4) support staffs to assist and coordinate with the Consultant; and,
3. Determine the acceptability of the deliverables and shall be the approving authority for all operations-related activities, including payment of the Service Provider's remuneration under the contract.

## **VII. Approved Budget for the Contract (ABC)**

The ABC for the provision of services under this TOR is ***THIRTEEN MILLION AND EIGHT HUNDRED THOUSAND PHILIPPINE PESOS (PhP13,800,000.00)***, inclusive of all applicable Government taxes and charges. Refer to **Annex A** for breakdown of the ABC.

The succeeding phases of the project from the second semester of 2017 until 2018 will be implemented under a separate TOR and contract.

## **VIII. Qualification Requirements**

1. The Service Provider must be a Strategic Communications Firm / Media Planning and Placement Agency / Advertising Agency with the necessary personnel and staffs to develop and implement the LTV survey results dissemination and advocacy 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 Service Provider, 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. 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 Service Provider 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. 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).

## **X. Milestones / Payment Schedule**

Payments to the Service Provider shall be made in accordance with the schedule below and subject to the usual Government accounting and auditing requirements.

<b>Contract Milestones</b>	<b>% of the Total Budget</b>
<p>Upon acceptance of <b>inception report and work plan</b> (<i>output/deliverable #1</i>), which</p> <ul style="list-style-type: none"> <li>• sums up the service provider's understanding of the Ambisyon Natin 2040 communication strategy, assesses its progress thus far, and describes how the service provider intends to achieve the specified communication objectives of AmBisyon Natin 2040; and</li> <li>• specifies activities and tasks to be undertaken by the Service Provider in fulfilling the project's scope of services and achieving the communication objectives.</li> </ul>	10%
<p>Upon acceptance of <b>detailed media plan</b> for January to June 2017 and recommended media strategies for the second semester of 2017 until 2018 (<i>output/deliverable #2</i>).</p> <p>a) The detailed plan for 2016 should include the following:</p> <ul style="list-style-type: none"> <li>• AmBisyon Natin 2040 overarching direction and key messages, which should be based on long-term vision research results and linked with other initiatives such as the Sustainable Development Goals and the next Philippine Development Plan</li> <li>• Stakeholder and audience maps, positioning and programs and priorities for action;</li> <li>• Proposed activities and materials for specified target audiences (should include sample concepts for materials);</li> <li>• Implementation schedule; and</li> <li>• Cost estimates for six (6) months starting January 2017, covering all major media types and activities with wide reach and high relevance.</li> </ul> <p>b) The strategies for the second semester 2017 until 2018 should build on the first semester 2017 plan and anticipate new developments.</p>	40%

<b>Contract Milestones</b>	<b>% of the Total Budget</b>
Upon acceptance of completed/implemented advocacy strategy/media plan which includes a) the materials developed and produced for dissemination and/or activities across identified media/platforms b) media buys and placements, and c) monthly monitoring reports ( <i>output/deliverable #s 3, 4, and 5</i> )	40%
Upon acceptance of a) evaluation report, b) compilation of data/information and multi-media materials such as videos, audio recordings, and/or photographs made, collected, reviewed, validated, and analyzed in relation to the project and c) terminal report ( <i>output/deliverable #s 6 and 7</i> )	10%

## **XI. Submission of Proposals**

Interested Strategic Communications Firm / Media Planning and Placement Agency / Advertising Agency must secure 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 (**Annex B**);
2. Project proposal, with brief discussions on the following components:
  - (a) Proposed media plan/strategy with cost estimates, that covers all major media types;
  - (b) Proposed implementation strategy; and,
  - (c) Proposed monitoring and evaluation system.
3. Other documentary requirements as specified in the Bidding Documents.

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

1. Detailed breakdown of proposed expenses, including remuneration/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.

## **XII. Selection Process and Criteria**

Qualified candidates shall be shortlisted based on the attached criteria in **Annex C**.

Shortlisted candidates will then be requested to present/pitch their 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. Strategic framework and advocacy plan;
2. Media plan/strategy with cost estimates, that covers all major media types;
3. Implementation strategy to cover production of campaign materials as well as, media buying and coordination; and,
4. Monitoring and evaluation (M&E) 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.

## **XIII. Ownership**

All creative concepts and original materials formulated and designed in conjunction with this project shall be owned by the NEDA with full and exclusive rights on future use thereof both in the Philippines and internationally.

## **XIV. Retention Payment**

A retention payment of 10 percent shall be withheld. It shall be based on the total amount due to the Service Provider prior to any deduction and shall be retained from every progress payment until 50 percent of the value of the project, as determined by NEDA, is completed. If, after 50 percent completion, the project is satisfactorily done and on schedule, no additional retention shall be made; otherwise, the 10 percent retention shall be imposed.

The total “retention money” shall be due for release upon approval of the Terminal Report. The Service Provider 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 the 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.

## **XV. Penalties and Liquidated Damages**

The selected Service Provider shall be subjected to assessment by the NEDA as to the effectiveness of any phase of the campaign.

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

Where the Service Provider 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 Service Provider shall pay the 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, the 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 Service Provider.

To be entitled to such liquidated damages, the 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 Service Provider under the contract and/or collect such liquidated damages from the retention money or other securities posted by the Service Provider, whichever is convenient to NEDA.



## ANNEX A

### Breakdown of the Approved Budget of Contract (ABC)

#### Provision of Services for Research Results Dissemination and Advocacy Strategy for the Adoption of the National Long-Term Vision (AmBisyon Natin 2040)

Outputs/Deliverables	Amount
1. Inception report and work plan, which <ul style="list-style-type: none"> <li>• sums up the Service Provider's understanding of the Ambisyon Natin 2040 communication strategy, assesses its progress thus far, and describes how the service provider intends to achieve the specified communication objectives of AmBisyon Natin 2040; and</li> <li>• specifies activities and tasks to be undertaken by the Service Provider in fulfilling the project's scope of services and achieving the communication objectives.</li> </ul>	
2. Detailed media plan for January to June 2017 and recommended media strategies for the second semester of 2017 until 2018. a) The detailed media plan for January to June 2017 should include the following: <ul style="list-style-type: none"> <li>• AmBisyon Natin 2040 overarching direction and key messages, which should be based on long-term vision research results and linked with other initiatives such as the Sustainable Development Goals and the next Philippine Development Plan</li> <li>• Stakeholder and audience maps, positioning and programs and priorities for action;</li> <li>• Proposed activities and materials for specified target audiences;</li> <li>• Sample concepts of proposed materials</li> <li>• Implementation schedule; and</li> <li>• Cost estimates for six (6) months starting January 2017, covering all major media types and activities with wide reach and high relevance.</li> </ul> b) The strategies for the second semester of 2017 until 2018 should build on the first semester 2017 plan and anticipate new developments.	
3. Concepts and production of materials for dissemination and/or activities across identified media/platforms in the approved media plan/strategy, subject to approval of the NEDA.	
4. Media buying and coordination services for selected media based on approved media plan/strategy for the six-month engagement period. This shall include coordination and negotiation for media rates, spots, bonuses, etc., inclusive of all agency service fees.	
5. Monitoring and evaluation (M&E) reports gauging the implementation of the approved plan, including regular and as-needed status updates to NEDA that will allow for timely interventions.	
6. Compilation of data/information and multi-media materials such as videos, audio recordings, and/or photographs made, collected, reviewed, validated, and analyzed in relation to the project.	
7. Terminal Report with assessment/evaluation of the effectiveness of the entire campaign and recommended adjustments, if needed for the second semester of 2017 until 2018.	
<b>GRAND TOTAL</b>	<b>13,800,000</b>

*Note: Breakdown of fees is still subject to recommendation and agreements of the winning Service Provider and the NEDA.*

## ANNEX B

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

**Project Title:** Provision of Services for the Research Results Dissemination and Advocacy Strategy for the Adoption of the National Long-Term Vision (AmBisyon Natin 2040)

<b>Company Name:</b>	
<b>Office Address:</b>	
<b>Telephone Number:</b>	
<b>Fax:</b>	
<b>Email :</b>	
<b>Website:</b>	

#### A. TRACK RECORD

1. Number of years in the advertising business: \_\_\_\_\_

2. List of top 10 clients for the past 5 years (in terms of total value of advertising contract/s)

CLIENT'S NAME	TOTAL VALUE OF ADVERTISING CONTRACT/S (in PHP)	NUMBER OF YEARS THAT YOUR FIRM HAS BEEN ENGAGED/ EMPLOYED BY CLIENT
a.		
b.		
c.		
d.		
e.		
f.		
g.		
h.		
i.		
j.		

3. Has your company received any awards in the past five (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 advocacy campaign engaging the youth in the past five (5) years? Please list them below.

CAMPAIGN TITLE	CLIENT/PRODUCT	DURATION OF CAMPAIGN	TOTAL VALUE OF CAMPAIGN CONTRACT (in PHP)	CAMPAIGN OBJECTIVES	CAMPAIGN OUTCOMES/IMPACTS (Please indicate source of feedback/information on campaign impacts)
a.					
b.					
c.					
d.					

(Please use additional sheets if necessary)

## B. KEY PERSONNEL

	FULL NAME	POSITION/ TITLE	EDUCATIONAL ATTAINMENT	TOTAL NUMBER OF YEARS OF RELATED EXPERIENCE	AREAS OF EXPERTISE	AWARDS RECEIVED, IF ANY (Please indicate name of award, year received, and award-giving body)
Project Manager/Team Leader or equivalent						
Creative Director or equivalent						
Account Director or equivalent						

(Please use additional sheets if necessary)

**C. FINANCIAL CAPACITY\***

$$\text{Financial Capacity} = \frac{(\text{Current Assets} - \text{Current Liabilities}) - (2 \text{ months cost of all ongoing and committed projects})}{2 \text{ months cost of the Approved Budget for the Contract (ABC)}}$$

*\*Please attach a copy of your company's latest financial statement. The Financial Capacity of the Firm/Service Provider may be supplemented by a Letter of Credit (LC) from a commercial bank in the Philippines equivalent to at least two (2) months cost of the ABC*

We hereby certify that all information stated above are true and correct. We hereby authorize the National Economic and Development Authority 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)

## ANNEX C

### General Criteria for Shortlisting of Bidders for the Consulting Services for the Survey Results Dissemination and Advocacy Strategy for the Adoption of the National Long-Term Vision (AmBisyon Natin 2040)

CRITERIA	
<b>1</b>	<b>Track Record (60%)</b>
	Number of years in the advertising industry (30%)
	Number of advocacy campaign/s engaging the youth within the last 5 years (30%)
<b>2</b>	<b>Qualification of Key Personnel (30%)</b>
	<b><i>Project Manager/Team Leader or equivalent (14%)</i></b>
	Recognition/award received (5%)
	Years of related work experience (5%)
	Educational attainment (4%)
	<b><i>Creative Director or equivalent) (8%)</i></b>
	Recognition/award received (3%)
	Years of related work experience (3%)

CRITERIA	
	Educational attainment (2%)
	<b><i>Account Director or equivalent (8%)</i></b>
	Recognition/award received (3%)
	Years of related work experience (3%)
	Educational attainment (2%)
<b>3</b>	<b>Financial Capacity (10%)</b>
	$FC = \frac{(CA - CL) - 2 \text{ months cost of all ongoing/committed projects}}{2 \text{ months cost of ABC}}$ <p>where:  <i>FC</i> = Financial Capacity  <i>CA</i> = Current Assets  <i>CL</i> = Current Liabilities</p>
	Financial Capacity should be at least 100%

**Notes:**

- A prospective bidder must get a total of at least 70 points to be included in the shortlist.
- The Financial Capacity of the Firm/Service Provider may be supplemented by a Letter of Credit (LC) from a commercial bank in the Philippines equivalent to at least two (2) months cost of the ABC.