

Section VII. Terms of Reference

[Terms of Reference normally contain the following sections: (a) Background; (b) Objectives; (c) Scope of the Services; (d) Training (when appropriate); (e) Reports and Time Schedule; and (f) Data, Local Services, Personnel, and Facilities to be provided by the Procuring Entity.]

**TERMS OF REFERENCE
FOR THE PROCUREMENT OF CONSULTING SERVICES FOR
A NATIONWIDE PDIC PUBLIC AWARENESS AND REPUTATION SURVEY**

I. PROJECT DESCRIPTION/BACKGROUND

The Philippine Deposit Insurance Corporation (PDIC) conducted its first nationwide public awareness survey in 2019 to establish baseline data of the level of public awareness on the Corporation and on deposit insurance. The baseline data generated from the survey were used to design a strategic communication plan in 2019 aimed at increasing the level of public awareness on PDIC and deposit insurance; and at strengthening stakeholder affinity for the Corporation.

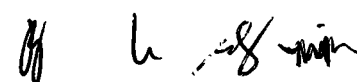
The conduct of the second nationwide public awareness survey in 2021 is imperative to gauge the increase in the level of public awareness and positive perception on PDIC. This initiative will also sustain the Corporation's compliance with the Core Principles for Effective Deposit Insurance Systems established by the International Association of Deposit Insurers (IADI), specifically Principle 10 on Public Awareness that provides for independent evaluations of the effectiveness of public awareness programs or activities on an ongoing and periodic basis.

II. PROJECT OBJECTIVES**General Objective**

Conduct a nationwide survey to measure public awareness on PDIC and deposit insurance, and public perception of the Corporation's reputation as a government financial institution, and report the results.

Specific Objectives

1. Administer the public awareness and reputation survey in accordance with this Terms of Reference.
2. Report the results of the survey.
3. Compare the level of public awareness and perception on reputation against the results of the 2019 PDIC nationwide public awareness survey.
4. Identify stakeholders' sources and channels of information on PDIC and deposit insurance; and depositor behavior.
5. Identify key insights from the survey results which may impact on the development and implementation of future public awareness programs.

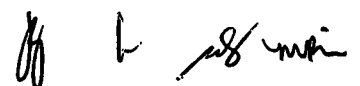


6. Identify PDIC's strengths and opportunities for improvement in terms of reputation and how its reputation level/index compares with global and local indices.
7. Recommend strategies critical to the implementation by PDIC of its public awareness and communications programs.

III. DEFINITION OF TERMS

- a. *Philippine Deposit Insurance Corporation (PDIC or the "Corporation")* – is a Government Instrumentality attached to the Department of Finance, mandated to protect depositors by providing deposit insurance coverage for the depositing public and to help promote financial stability.
- b. *Terms of Reference (TOR)* – refers to the required Government procurement document provided by the procuring entity that normally contains the following sections: (a) Background; (b) Objectives; (c) Scope of the Services; (d) Training (when appropriate); (e) Reports and Time Schedule; (f) Data, Local Services, Personnel, and Facilities; (g) Approved Budget for Contract and (h) payment schedule.
- c. *Project* – or otherwise referred to as "Nationwide PDIC Public Awareness and Reputation Survey" in this TOR is the subject of the procurement.
- d. *Methodology* – is the research/survey design or plan of approach/execution/implementation of the required Nationwide PDIC Public Awareness and Reputation Survey, including the proposed demographics of respondents (i.e., age, gender, location, economic status, etc.) which should be consistent with the latest census administered by the Philippine Statistics Authority (2015 or 2020, should data for the latter be available in time for the implementation of the survey). For the purpose of this project, the methodology will involve a random, multi-stage sampling for 1,500 respondents in the National Capital Region, North and Central Luzon, South Luzon, Visayas, and Mindanao; and the survey questionnaires will be administered through a face-to-face interview with respondents. Should strict community quarantines and health protocols be imposed by the National Government during the conduct of the survey in any of the locations which will be identified/included in the survey, phone or video call/virtual interviews may be considered in lieu of face-to-face interview. Any change in methodology would require the prior consent of PDIC, the amendment of the contract and the possible downward adjustment of the fees payable to service provider. Provided that such change in methodology shall have no additional or extra cost to PDIC.
- e. *Survey* – a systematic method for gathering information from (a sample of) individuals for the purposes of describing the attributes of the larger population of which the individuals are members.¹

¹ <https://docplayer.net/23957624-Principles-of-survey-methodology.html>



- f. *Questionnaire* – is the instrument or tool composed of questions for target respondents to accomplish during the conduct of the Nationwide PDIC Public Awareness and Reputation Survey.
- g. *Milestones* – refer to the specific deliverables reflected per tranche or time frame under *Item XI. Payment, Deliverables and Timetable*.
- h. *Pilot Test* – is a pre-test to be administered to a select number of respondents to check for the clarity and appropriateness of the survey questionnaire; correctness of the instructions for the survey; and the efficiency of administration in terms of time, among others. For this purpose, the number of participants to the pilot test should not be lower than 10. The results of the pilot test may, when applicable, determine adjustments to the survey questionnaire.
- i. *Global Survey* – is a survey project conducted and completed in the Philippines or in a foreign jurisdiction by a service provider for international or multinational organization/companies. For this survey project, an international organization will refer to an organization whose membership, scope and presence are international or involving more than a single country. A multinational corporation or organization, on the other hand, refers to an organization whose facilities and assets are found in at least one country other than its home country.
- j. *Completed Survey* – is a project where contract was entered into, and survey was undertaken and completed in the recent five years.
- k. *Nationwide Survey* – is a survey conducted and completed by a survey provider involving respondents throughout the Philippines.

IV. APPROVED BUDGET FOR CONTRACT (ABC)

THREE MILLION FIVE HUNDRED SIXTY-ONE THOUSAND AND SIX HUNDRED PESOS (Php3,561,600.00), (inclusive of all applicable taxes and out-of-pocket expenses).

V. SCOPE OF WORK

The Consulting Service shall:

1. Develop and present to PDIC its proposed work plan and survey methodology.
2. Upon approval by PDIC, implement the work plan and methodology.
3. Upon approval by PDIC, pilot test the survey questionnaire to the selected respondents.

4. Submission of the final questionnaire and survey work plan, upon approval by PDIC.
5. Conduct of the survey.
6. Submit and present final report² in narrative format to PDIC Management/Board. The report shall be in both soft and hard copies.
7. Based on insights from the survey results, provide recommendations on strategies critical to the implementation by PDIC of its public awareness and communications programs.
8. Provide to PDIC multimedia master files of the results/data which should be compatible with and extractable using MS Office applications.

VI. MINIMUM QUALIFICATIONS OF THE FIRM/CONSULTING SERVICE

1. The Consulting Service who intends to apply for eligibility and short listing for the Project must have proven capability and good track record in the business of financial/marketing research, or in the design and development of public awareness and public perception/reputation surveys, or in communication/marketing research/analytics, and must have been in business operation for at least five (5) years on the date of the advertisement/posting of the **Invitation for the Request of Expression of Interest**. In case of a joint venture, each firm should have been in business operation for at least five (5) years.
2. The Consulting Service must have completed at least five (5) surveys in the recent five years with at least 1,200 respondents per survey.
3. Of these five (5) surveys, the Consulting Service must have conducted/administered at least one (1) nationwide and at least one (1) global survey in the recent five years.

VII. EVALUATION PROCEDURE

This Project will make use of a **Quality-Cost-Based Evaluation (QCBE)**.

The Consulting Service that submitted Expression of Interest, including eligibility documents in accordance with the provisions of the Revised Implementing Rules and Regulations of R.A. No. 9184, otherwise known as the "Government Procurement Reform Act", will be evaluated based on a set of criteria and rating system to be used by PDIC for the short list of the Consulting Services.

² In accordance with the Project Objectives.



A shortlist of Consulting Services or the top 3 eligible bidders shall be determined from the evaluation of the eligible consultants who will be qualified to submit quotations based on the criteria for short listing of eligible suppliers. Only those who garnered at least 85% of the criteria for shortlisting shall be considered.

The following shall be used as evaluation criteria for shortlisting:

Evaluation Criteria	Weight
Relevant/applicable experience and good track record in communications/marketing baseline surveys, locally and globally	56%
Qualifications of the Team Leader and the Project Team Members	39%
Job capacity to handle project	5%
TOTAL	100%
Passing Rate	85%

Opening of quotations will be conducted using non-discretionary "pass/fail" based on the following criteria:

The PDIC shall evaluate the quotations using the QCBE procedure with at least 85% passing rate. Minimum requirements and criteria should be met, otherwise, bidder shall be considered disqualified.

Shortlisted possible Consulting Services shall be evaluated based on two components: Technical Proposal (60%) and Financial Proposal (40%). Shortlisted Consulting Services will be required to present their proposed methodology, which shall also be subject of a separate evaluation.

The Philippine Deposit Insurance Corporation reserves the right to reject any or all quotations, declare a failure of procurement, or not award the project at any time in accordance with Section 41 of RA 9184 and its Revised IRR, without thereby incurring any liability to the affected proponent/s.

VIII. DURATION OF ENGAGEMENT

To be completed within 12 weeks upon issuance of Notice to Proceed (NTP)

IX. TARGET NO. OF RESPONDENTS: 1,500 respondents

Demographics/data of survey respondents should consider but not be limited to: age, gender, income bracket, and region. The said variables

should approximate the results of the most recent PSA-administered national census.

X. PROPRIETORSHIP CLAUSE

Ownership of all data and reports gathered by the service provider as a result of its engagement for consulting services shall exclusively be vested with the Philippine Deposit Insurance Corporation.

XI. PAYMENT, DELIVERABLES AND TIMETABLE

DELIVERABLES	TIMELINE	APPROVAL/PAYMENT SCHEDULE*
1. Submission of survey work plan (with timetable), methodology and questionnaire (with PDIC's inputs)	One (1) week after issuance of Notice to Proceed (NTP)	5% of Contract Price subject to approval by PDIC of the work plan, methodology and questionnaire
2. Conduct of Pilot Test and Submission of Report on Results of Pilot Test 3. Submission of Final survey work plan and Questionnaire** (based on review and results from the Pilot Test)	Three (3) weeks from PDIC's notice of approval of the work plan	20% of Contract Price subject to submission of Pilot Test results, final survey work plan and Questionnaire
4. Conduct of Survey among targeted sample respondents	Three (3) weeks	35% of Contract Price subject to submission of Initial Report
5. Submission of Initial Report on survey results (hard & soft copies), including the collated and analyzed data per agreed demographics and variables	Two (2) weeks	
6. Presentation to PDIC's top management of the following: <ul style="list-style-type: none">• Current level of awareness, compared with the results of the 1st PDIC's nationwide public awareness survey in 2019.• Perception of PDIC's reputation as a government financial institution• Sources and channels of information on PDIC and deposit insurance and savings behavior 7. Based on insights from the survey result, submission of recommendations on strategies critical to the implementation by PDIC of its public awareness and communications programs.	Two (2) weeks after review by PDIC of the Initial Report	20% of Contract Price upon presentation to the PDIC's top management

<p>8. Submission of Final Report (hard and soft copies) including the following:</p> <ul style="list-style-type: none"> a) Final collated and analyzed data per agreed demographics and variables; b) Recommendations; and c) Master files 	<p>One (1) week after presentation to the PDIC President/Board</p>	<p>20% of Contract Price subject to approval by PDIC of the Final Report</p>
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*Payable no earlier than seven (7) working days upon PDIC's receipt of deliverables and billing statement


**To consider major dialects spoken in the areas of targeted sample respondents

Prepared by:


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 Maria Patricia Torres
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 Information Officer IV, CCD
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CATHERINE C. SAN JOSE
 Corporate Executive Officer II, OVP-CAG
 Technical Working Group

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 Provisional Member

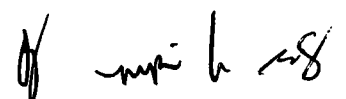
Recommending Approval by:


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JOSE G. VILLARET, JR
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 Provisional Member

Approved by:

ROBERTO B. TAN
 President and CEO



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Tel. No. 841-4925; Fax No. 8414931; Website: www.pdic.gov.ph;

BIDS AND AWARDS COMMITTEE

**BIDDING FOR THE PROCUREMENT OF A CONSULTING SERVICE PROVIDER FOR A
NATIONWIDE PUBLIC AWARENESS AND REPUTATION SURVEY**

BID BULLETIN NO. 2

This is to notify bidders of the clarifications in the Instructions to Bidders (ITB) as discussed during the pre-bid conference conducted on 16 November 2021 at the 8th Floor Board Room, SSS Building, Ayala Avenue corner V. A. Rufino St., Makati City via MS Team:

Sec. 6.1 of the BDS, states that *"the consultant shall not in any way, assign, sub-contract or transfer its rights and obligations relative to this project without written consent of the PDIC"*.

PDIC **clarifies** that the Consultant may subcontract portion of the Consulting Services as may be approved by PDIC provided that the sub-consultant must comply with the eligibility criteria thru the submission of the legal eligibility documents as enumerated in Section 2.1.a of the Eligibility Requirements of the Philippine Bidding Documents.

As provided in the Technical Proposal Forms – Notes for Consultant, the Consultant shall indicate the portion of the consulting services that will be sub-contracted, identify the corresponding sub-consultant and include the legal eligibility documents of such sub-consultant.

The eligibility documents of the sub-consultant must be included in the submission of the Technical and Financial Proposals.

All other requirements specified under the Instruction to Bidders, the TOR, the BDS, and other documents issued for this procurement, which are not affected by the foregoing modifications/revisions, shall remain valid, effective, and subsisting.

BIDS AND AWARDS COMMITTEE

November 18, 2021

SHORTLISTING OF ELIGIBLE BIDDERS
*Procurement of Consulting Services for a
 Nationwide PDIC Public Awareness and Reputation Survey*

CRITERIA	WEIGHT	RATING
1. Relevant/applicable experience and good track record	56%	
1.1. Relevant and good track record in the conduct of baseline surveys for local and global clients with <ul style="list-style-type: none"> • More than 5 years of experience • 5 years of experience 	20% 18%	
1.2. Had completed in the recent five years a total of five (5) surveys with at least 1,200 respondents each survey <ul style="list-style-type: none"> • More than five (5) surveys, with at least 1,200 respondents each survey • Five (5) surveys with at least 1,200 respondents each survey 	17% 15%	
1.3. Of the five (5) completed surveys, at least one (1) is a global survey and at least one (1) is a nationwide survey. <ul style="list-style-type: none"> • More than one (1) global survey and more than one (1) nationwide survey completed with Project cost equivalent to the ABC or higher • One (1) global survey and one (1) nationwide survey completed with Project cost equivalent to the ABC or higher 	19% 17%	
2. Qualifications of the Team Leader and Project Team	39%	
2.1. Team Leader has nationwide and global experiences of at least five (5) years in communications/marketing baseline data survey <ul style="list-style-type: none"> • More than 5 years • 5 years 	22% 20%	
2.2. Project Team Members have an average experience of at least five (5) years in the conduct of subject survey <ul style="list-style-type: none"> • More than 10 years • 5 to 10 years 	17% 15%	
3. Job Capacity of the Consulting Services	5%	
3.1. Project Team has the capacity to undertake additional similar workloads on top of those currently being undertaken by the Consulting Services: <ul style="list-style-type: none"> • 0 ongoing projects • 1 ongoing project • 2 or more ongoing projects 	5% 3% 0%	
TOTAL	100%	
Passing Rate	85%	

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TECHNICAL BID/PROPOSAL EVALUATION
*Procurement of Consulting Services for a
 Nationwide PDIC Public Awareness and Reputation Survey*

- I. **TECHNICAL PROPOSAL – 60%**
 - II. **FINANCIAL PROPOSAL – 40%**
- 100%**

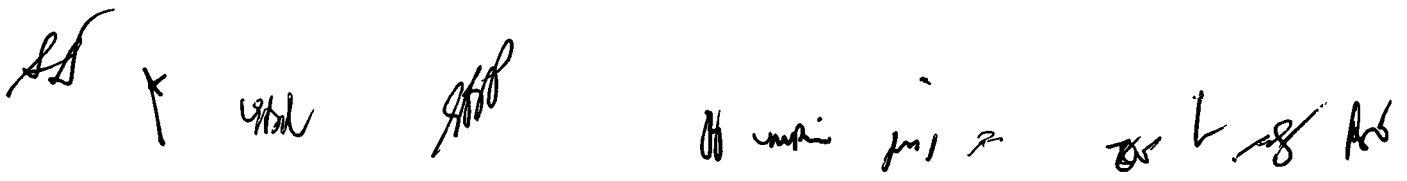
QUOTE NO. _____

Technical Proposal / Project Design / Presentation (60% of total rating)	MAX RATING	Bidder 1	Bidder 2	Bidder 3						
<p>1. Experience and Capability of Consulting Services Project surveys completed in the recent five years locally and globally, and quality of performance in similar projects with any reputable public or private organization or financial institutions as evidenced by documents required in the Philippine Bidding Documents.</p> <p>Metrics:</p> <table border="1"> <tr> <td>16% to 20%</td> <td>With more than five (5) surveys, with more than two (2) global survey sand more than two (2) nationwide surveys for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.</td> </tr> <tr> <td>11% to 15%</td> <td>With more than five (5) surveys, with two (2) global surveys and two (2) nationwide surveys for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.</td> </tr> <tr> <td>1% to 10%</td> <td>With five (5) surveys, with at least one (1) global survey and one (1) nationwide survey for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.</td> </tr> </table>	16% to 20%	With more than five (5) surveys, with more than two (2) global survey sand more than two (2) nationwide surveys for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.	11% to 15%	With more than five (5) surveys, with two (2) global surveys and two (2) nationwide surveys for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.	1% to 10%	With five (5) surveys, with at least one (1) global survey and one (1) nationwide survey for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.	20%			
16% to 20%	With more than five (5) surveys, with more than two (2) global survey sand more than two (2) nationwide surveys for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.									
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1% to 10%	With five (5) surveys, with at least one (1) global survey and one (1) nationwide survey for any public or private organization. In case of incremental differences in the number of surveys conducted by bidders, scores may vary based on the score range provided.									
SUB-TOTAL FOR ITEM 1	20%									
2. Qualification of proposed Project Team										

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(Based on CVs to be submitted; CVs of Team Leader and members of the Project Team must be submitted)

<p>2.1. Experience as a global and nationwide team leader for researches/surveys in the field of either communications or marketing (combined experience)</p> <p>Metrics:</p> <table border="1" data-bbox="209 501 865 739"> <tr> <td>11% to 15%</td> <td>More than 7 years. In case of incremental differences in the number of years per bidder, scores may vary based on the score range provided.</td> </tr> <tr> <td>10%</td> <td>6 - 7 years</td> </tr> <tr> <td>5%</td> <td>5 years</td> </tr> </table>	11% to 15%	More than 7 years. In case of incremental differences in the number of years per bidder, scores may vary based on the score range provided.	10%	6 - 7 years	5%	5 years	15%			
11% to 15%	More than 7 years. In case of incremental differences in the number of years per bidder, scores may vary based on the score range provided.									
10%	6 - 7 years									
5%	5 years									
<p>2.2. Experience as global and nationwide team members for researches/surveys in the field of either communications or marketing (combined average for Team members)</p> <p>Metrics:</p> <table border="1" data-bbox="209 1038 865 1374"> <tr> <td>11% to 15%</td> <td>More than 10 years. In case of incremental differences in the number of years per bidder, scores may vary based on the score range provided</td> </tr> <tr> <td>6% to 10%</td> <td>6-10 years. In case of incremental differences in the number of years per bidder, scores may vary based on score range provided.</td> </tr> <tr> <td>5%</td> <td>5 years</td> </tr> </table>	11% to 15%	More than 10 years. In case of incremental differences in the number of years per bidder, scores may vary based on the score range provided	6% to 10%	6-10 years. In case of incremental differences in the number of years per bidder, scores may vary based on score range provided.	5%	5 years	15%			
11% to 15%	More than 10 years. In case of incremental differences in the number of years per bidder, scores may vary based on the score range provided									
6% to 10%	6-10 years. In case of incremental differences in the number of years per bidder, scores may vary based on score range provided.									
5%	5 years									
SUB-TOTAL FOR ITEM 2		30%								
3. Methodology (Score sheet on separate page)		50%								
SUBTOTAL FOR ITEM 3		50%								
TOTAL		100%								


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the methodology will involve a random, multi-stage sampling for 1,500 respondents in the National Capital Region, North and Central Luzon, South Luzon, Visayas, and Mindanao; and the survey questionnaires will be administered through a face-to-face interview with respondents. (Please refer to Section III.D of this TOR on the proposed alternative methodology in case of strict health protocols). Provider should be able to present proofs of past completed projects that made use of the proposed methodology (face-to-face) and other alternative methodology/ies.

Metrics:

11% to 20%	More than one (1) complete project made use of alternative methodology
10%	One (1) completed project made use of alternative methodology
0	No completed project made use of alternative methodology

4. Comprehensive – Work plan and methodology cover variables that are relevant sources of insights for PDIC's Public Awareness and communication strategies, and consider risks and appropriate solutions in the course of implementing the project

20%

Metrics:

11% to 20%	The work plan and methodology consider <u>all</u> possible problems, risks and appropriate solutions in the course of implementing the project, with no major issues raised for clarification from the panel
6% to 10%	The work plan and methodology consider some problems, risks and appropriate solutions in the course of implementing the project, with 1-2 major issues raised for clarification from the panel
1% to 5%	The work plan and methodology consider some possible problems, risks and appropriate solutions in the course of implementing the project, with more than 2 major issues raised for clarification from the panel

5. Timeline

20%

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METHODOLOGY RATING SHEET
 Procurement of Consulting Services for a
 Nationwide PDIC Public Awareness and Reputation Survey

Methodology (Criteria for Presentation for Technical Evaluation)	MAX RATING	Bidder 1	Bidder 2	Bidder 3						
Work plan and methodology are simple and appropriate: 1. <u>Clear</u> - Well-organized, easy to understand work plan Metrics: <table border="1" style="width: 100%;"> <tr> <td style="width: 15%;">11% to 20%</td> <td>Methodology and presentation of design/plan are relevant and appropriate to the requirements of the project, with no major issues raised for clarification from the panel that required adjustments in the methodology as proposed</td> </tr> <tr> <td>6% to 10%</td> <td>With 1-2 major issues raised for clarification from the panel that required adjustments in the methodology as proposed.</td> </tr> <tr> <td>1% to 5%</td> <td>With more than 2 major issues raised</td> </tr> </table>	11% to 20%	Methodology and presentation of design/plan are relevant and appropriate to the requirements of the project, with no major issues raised for clarification from the panel that required adjustments in the methodology as proposed	6% to 10%	With 1-2 major issues raised for clarification from the panel that required adjustments in the methodology as proposed.	1% to 5%	With more than 2 major issues raised	20%			
11% to 20%	Methodology and presentation of design/plan are relevant and appropriate to the requirements of the project, with no major issues raised for clarification from the panel that required adjustments in the methodology as proposed									
6% to 10%	With 1-2 major issues raised for clarification from the panel that required adjustments in the methodology as proposed.									
1% to 5%	With more than 2 major issues raised									
2. <u>Feasible</u> - Practicable plan, reliable and valid methodology Metrics: <table border="1" style="width: 100%;"> <tr> <td style="width: 15%;">11% to 20%</td> <td>Methodology as presented is practicable and valid for implementation in PDIC context, with no major issues raised to warrant a revision of the proposal.</td> </tr> <tr> <td>6% to 10%</td> <td>Methodology as presented is practicable and valid for implementation in PDIC context, with 1-2 major issues raised that will require a revision of the proposal.</td> </tr> <tr> <td>1% to 5%</td> <td>Methodology as presented is practicable and valid for implementation in PDIC context, with more than 2 major issues raised that will require revision of the proposal.</td> </tr> </table>	11% to 20%	Methodology as presented is practicable and valid for implementation in PDIC context, with no major issues raised to warrant a revision of the proposal.	6% to 10%	Methodology as presented is practicable and valid for implementation in PDIC context, with 1-2 major issues raised that will require a revision of the proposal.	1% to 5%	Methodology as presented is practicable and valid for implementation in PDIC context, with more than 2 major issues raised that will require revision of the proposal.	20%			
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1% to 5%	Methodology as presented is practicable and valid for implementation in PDIC context, with more than 2 major issues raised that will require revision of the proposal.									
3. <u>Innovative</u> - Creative and supportive of the objectives of the PDIC. For the purpose of this project,	20%									

Metrics:					
20%	The proposed timetable meets the prescribed timeline; milestones and deliverables are clearly indicated and consistent with approved TOR				
0	The proposed timetable does not meet the prescribed timeline; milestones and deliverables				
TOTAL		100%			

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SUMMARY OF EVALUATION
RATING SHEET
Procurement of Consulting Services for a
Nationwide PDIC Public Awareness and Reputation Survey

Shortlisted Consulting Service	Technical Proposal (60%) (A)			Financial Proposal (40%) (B)		RATING	RANK
	SCORE			Project Cost (Rank)	40%		
	Experience / Qualifications (30%)	Methodology (30%)	60%			100%	
No. 1							
No. 2							
No. 3							
TOTAL							
PASSING SCORE (85%)							

25

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