

REQUEST FOR PROPOSAL

REFERENCE NO.: **MR22-08-114**

We are inviting all interested consultancy firms to submit their best proposal for the **PROCUREMENT OF CONSULTING SERVICES FOR THE PREPARATION AND IMPLEMENTATION OF A STAKEHOLDER SATISFACTION EVALUATION OF NATIONAL DEVELOPMENT COMPANY'S PERFORMANCE AS AN INVESTMENT PARTNER, LENDER, LESSOR, AND CLIENT, USING THE LATEST ENHANCED STANDARD METHODOLOGY FOR THE CONDUCT OF THE CUSTOMER SATISFACTION SURVEY (CSS) [RELEASED SEPTEMBER 2019]**

TERMS OF REFERENCE

BACKGROUND

The National Development Company (NDC), an attached agency of the Department of Trade and Industry (DTI), functions as the government's investment arm. It develops, finances, and implements pioneering development-oriented projects vital to the sustainability of the government's structural reforms and economic policies in partnership with other investors from either the public or private sector.

Given this mandate, NDC as a whole and NDC's individual core and support groups' performances are monitored through performance indicators based on their respective annual strategic objectives and measures.

Foremost among these indicators are measurements of how NDC fared in terms of its performance from the perspective of its subsidiary/affiliate companies, partners, lessees, new project proponents, consultants, service providers, and suppliers. Therefore, as part of NDC's commitment to transparency, accountability, and good governance, a Customer Satisfaction Survey shall be conducted.

The Governance Commission for Government Owned or Controlled Corporations (GCG), as of this date, has not issued additional guidelines for the conduct of *the Customer Satisfaction Survey (CSS) for 2022 in the GOCC Sector*. Therefore, the **latest Guide Book for GOCCs or the enhanced standard methodology for the conduct of the CSS (released September 2019), the GCG-issued survey questionnaire for NDC (released March 20, 2020), the additional guidelines in the conduct of the CSS for 2020 in the GOCC sector (released 14 August 2020), the additional guidelines in the conduct of the CSS for 2021 in the GOCC sector dated 26 February 2021, and any other GCG issuances, pertaining to the conduct of CSS, will still govern the conduct of the annual CSS.**

In case, there will be new issuance, from the GCG relative to the conduct of CSS 2022, it will govern on how this CSS 2022 will be done. This is in order to ensure a more organized and efficient implementation of the annual CSS. Given that NDC is a GOCC under the jurisdiction of GCG, NDC will be adopting the standard survey guidelines mandated by the GCG.

OBJECTIVES

The general objective of the study is to get feedback and measure, using quantitative and qualitative information, the satisfaction of primary customers on NDC's performance as an investment partner, client, and lessor.

In accordance with NDC's performance commitments with the Governance Commission for GOCCs (GCG), compliance with the requirements of the Performance Governance System (PGS) and compliance with ISO 9001 mandatory procedures, the specific objectives of the study are the following:

1. Measure the primary customers,' as defined in the **latest Guide Book for GOCCs or the enhanced standard methodology for the conduct of the CSS (released September 2019)** (composed of NDC partners, lessees, financing customers, among others) rating of NDC overall performance. The expected satisfaction rating is at least satisfactory or good from 100% of the respondents.
2. Measure the non-primary customers' (composed of NDC subsidiary/affiliate, new project proponents, consultants, service providers, suppliers, among others) rating of NDC's overall performance. The expected satisfaction rating is at least satisfactory or good from 100% of the respondents.
3. Evaluate NDC performance using the latest enhanced standard methodology for the conduct of the CSS (released September 2019), and the survey questionnaire for NDC (released March 20, 2020) as provided in the Governance Commission for Government Owned or Controlled Corporations' (GCG) Standard Methodology for the Conduct of the Customer Satisfaction Survey.

SCOPE OF WORK

The assessment will involve the design, preparation, coordination, implementation, and presentation of Customer Satisfaction Evaluation using **quantitative and qualitative** information from Key Informants (KIs) using **telephone interview** as described under the **latest** enhanced standard methodology for the conduct of the CSS **supplemented by the 14 August 2020 and 26 February 2021 issuances of the GCG on the additional guidelines in the conduct of the CSS in the GOCC sector for 2020 and 2021, respectively**. Additional survey instruments or questionnaires shall also be developed for customers not identified in the GCG standard format **in consultation with NDC**.

For the Survey and/or Key Informant Interview (KII), the target **number of respondents is 70 to 90** key personnel representing the mix of current primary customers of NDC and other stakeholders identified by NDC workgroups. NDC's universe of respondents falls below the GCG prescribed minimum number of respondents (n=100). Therefore, the target for the 2022 NDC client satisfaction survey is to cover the **complete members of NDC primary customers in 2022 with the addition of other stakeholders whose feedback are also needed by NDC in relation to ISO and PGS**.

The evaluation team is expected to do/come up with the following:

1. Identify/develop the following in consultation **with all concerned NDC workgroups**:
 - a. Validation if the GCG pre-determined performance parameters cover all Factors affecting satisfaction of each workgroup's customers. Performance indicators that are found to be significant but outside the GCG standard parameters **shall be added** as measure of overall NDC performance;
 - b. Use of the GCG standard likert scale for satisfaction and performance indicators/factors;
 - c. **Research instruments** such as but not limited to survey questionnaires and KII guide questions. The minimum required questions are those required in the GCG standard with additional questions from the workgroup consultations shall focus on other

measures of NDC customer satisfaction, in accordance with NDC's performance agreement with the Governance Commission for GOCCs (GCG) and in compliance with the requirements of the Performance Governance System (PGS) and ISO 9001 mandatory procedures;

2. Coordinate, manage, implement and facilitate quantitative and qualitative data collection using all identified/approved methodology and evaluation instruments;
3. Analyze, prepare and submit the results of the customer satisfaction evaluation study **using GCG prescribed CSS, which covers primary customers and ISO and/or PGS stakeholder survey, which includes all customers in addition to the primary customers.** Data gathering instruments used, complete transcripts, presentation materials and all reports, in both hard and soft copies, related to the conduct of interviews/consultation from the initial discussions with NDC up to the results and recommendations of the study;
4. Provide recommendations on how to improve NDC performance and increase the overall level of customer satisfaction based on the results of the study. Recommendations shall be supported by the quantitative and qualitative information gathered or correlation of data from the survey;
5. To present and discuss the following to NDC officers or representatives:
 - a. Inception report (indicators/factors, tools, and methodology)
 - b. Customer Satisfaction Evaluation results and recommendations

Governing the conduct of the annual CSS are the following: **1. the latest enhanced standard methodology for the conduct of the CSS (released September 2019); 2. the GCG issued survey questionnaire for NDC (released March 20, 2020); 3. the additional guidelines in the conduct of the CSS for 2020 in the GOCC sector (released 14 August 2020); the additional guidelines in the conduct of the CSS for 2021 in the GOCC sector dated 26 February 2021; and any other GCG issuances, pertaining to the conduct of CSS, not mentioned in this TOR.**

EXPECTED OUTPUT

The evaluation team is expected to submit **all reports** in the following formats:

1. 1 printed copy (signed or certified by the consultant)
2. DVD or USB containing soft/electronic copies of the report, transcripts, and all attachments in **MS Word** file/format and the presentation materials in **MS Power Point** file/format.

The reports (submitted in the abovementioned formats) shall include the following:

1. Inception report
(To be submitted within 1 week after consultations with all concerned NDC workgroups and presentation to NDC officers/representatives)
This covers the details of the Study (methods, survey instrument, KII guide questions, identified respondents, schedule of interviews, materials/equipment, and other requirements for the conduct of the study).
2. Final Survey instrument
(To be submitted within 2 weeks after submission of inception report)
All revisions made from the original guide questions including format, as a result of pilot testing, shall be discussed with NDC.
3. Draft Report / Results of the study

(To be submitted, presented and discussed with NDC management within 3 weeks after the interview of the last respondent)

This covers the detailed report on the status, comments, issues and recommendation gathered from the interviews regarding customer satisfaction on NDC performance in terms of the factors identified/approved in the inception phase.

4. Final Report

(To be submitted within 1 week after the presentation of Draft Report to NDC)

This covers all components of the draft report including corrections, comments, additional write-up/recommendations, answers to questions and other details given/required by NDC during the presentation of the Draft Report.

5. Documentation reports on the conduct of interviews/consultation

(To be included as attachments to the Final Report)

This report provides documents used during all activities undertaken starting the initial discussions with NDC up to the results and recommendations from the study. This includes copies of all materials used for the conduct of the study and the transcripts (as edited by the consultant) of all interviews with the respondents.

6. Soft/electronic copies of all interview records and the summarized data or processed survey information

(To be included as attachments to the Final Report contained in a flash disk or DVD)

These files shall include recordings of all interview sessions including the consolidated raw data used to generate the summarized results of the study.

Kindly refer to the **TIMELINE** for the specific reports/outputs that need to be submitted based on the CSS guidebook.

TIMELINE

Activities and Deliverables	No. of Days
1. Inception meeting and discussion of sampling design, methodology, protocols and work plan Output: Inception Report (includes survey instruments, KII guide questions, indicators/ parameters/ factors, evaluation framework and detailed methodology)	7
2. Review, add questions, format and translate survey instrument	7
3. Pilot testing of survey instrument and feedback for possible revision (pre-test results and Pre-test report)	7
4. Finalization of survey instrument	7
5. Train the team and submit final deployment list (training report)	7
6. Data collection set up (including production and preparation of fieldwork materials)	7
7. Data collection proper (OBSERVATION: observation report, clearing /debriefing report; SUPERVISION AND SPOT CHECKING - spot checking report)	14
8. Data cleaning and validation, computation of descriptive statistics, and presentation of draft report Data cleaning – Back checking report	21

Outputs: a. Electronic Copy of Consolidated Raw Data & b. Draft report on results of the study and presentation materials (Overall satisfaction in terms of primary customers - GCG) (Overall satisfaction level in terms of all types of customers All respondents for ISO and PGS)	
9. Revision writing and submission of final report Output: Final Report (includes attachments and documentation report)	7
TOTAL	84 days

QUALIFICATIONS

Consultancy Firm

The consultancy firm must have adequate experience in the methodologies of research and development with **at least five (5) years** of consultancy business and have completed at least **three (3) similar studies/projects** in the conduct of **customer satisfaction evaluation** and two **(2) other studies/projects related in nature**. At least two (2) certificates of satisfactory completion for similar or related evaluation studies should be provided. At least one completed similar project should have a project cost equivalent to at least Php 475,000 (50% of the ABC).

Project Team

The Overall Project Manager must be aware of the functions of the GCG and should have proven expertise in the demands of the Performance Governance System (PGS) and ISO 9001 standards with regards to measurement and analysis of customer satisfaction. At the minimum, the members of the evaluation team should consist of the following:

1. Overall Project Manager (1)

Oversees all activities of the study from start to finish ensuring that project objectives are realized. Monitors the operational details of the survey and work closely with field and data processing departments in meeting client expectations. Should be present in major meetings and trainings. Should approve the questionnaire, tabulation specifications and report draft. Presents the findings to the GOCC.

Minimum Qualifications

- 5 years relevant experience in planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects (with at least 3 years in the bidding firm)
- Bachelor of science degree, preferably in business, statistics or economics
- 1 training or seminar related to research and development
- Participated in 1 PGS or ISO related project / certified firm
- Technical writer for 2 projects

2. Assistant Project Manager Statistician/Assistant Project Manager (2)

Assist the Overall Project Manager in monitoring the survey and following through to completion. Should be present in all meetings and trainings. Prepares the fieldwork materials (i.e. questionnaire and other stimulus), data specs, and report. Conducts statistical analysis of the data.

Minimum Qualifications

- 3 years of relevant experience in planning, design, management, and implementation of customer satisfaction evaluation studies or research & development projects (with at least 2 years in the bidding firm)
- Bachelor of Science degree, preferably in business, statistics, or economics
- 1 training or seminar related to research and development
- Participated in 1 PGS or ISO-related project / certified firm
- Technical writer for 2 projects

3. Field Manager (1)

Oversees all fieldwork activities of the study from start to finish ensuring that project objectives are realized. Monitors the field operational details of the survey and work closely with research and data processing department in meeting client expectations.

Minimum Qualifications

- 3 years relevant experience in planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects (with at least 1 year in the bidding firm).
- Bachelor of science degree, preferably in business or economics
- 1 training or seminar related to research and development

4. Data Processing Manager (1)

Oversees all data processing activities of the study from start to finish ensuring that project objectives are realized. Monitors the data processing operational details of the survey and work closely with research and field department in meeting client expectations.

Minimum Qualifications

- 3 years relevant experience in planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects (with at least 1 year in the bidding firm)
- Bachelor of science degree, preferably in business or economics
- 1 training or seminar related to research and development

5. Field Supervisor (1)

Supervise during field activities (recruitment, interviews, etc.). Oversees all tasks related to data collection, which starts from recruitment of field team until the accomplished questionnaires have been received and deemed "clean". Should be the one to conduct the field training and should be present during the clearing / debriefing when all the data collection instructions are relayed. During the data collection or interviews, responsible for checking the accomplished questionnaires done by the interviewers. Before any questionnaire is processed for encoding, should check and approve

first each questionnaire to make sure that these follow the consistency and cleaning instructions provided.

Minimum Qualifications

- 3 years relevant experience in planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects, **preferably as field supervisor** (with at least 1 year in the bidding firm)
- Bachelor of science degree, preferably in business or economics
- 1 training or seminar related to research and development

6. Data Processing Supervisors (2)

Assist the Data Processing Manager in data processing related activities (programming, finalization of the script, checking of data completion, data processing and data cleaning).

Minimum Qualifications

- **3 years relevant experience in planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects, preferably in data processing related activities, including programming, finalization of the script, checking of data completion, data processing and data cleaning (with at least 1 year in the bidding firm)**
- **Bachelor of science degree, preferably in business, statistics, or economics**
- **1 training or seminar related to research and development**

7. Programmers/Scripters (including checker) (2)

Program the survey instruments into a survey link or an encoding script.

Minimum Qualifications

- **2 years relevant experience in planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects, preferably in programming survey instruments into a survey link or an encoding script (with at least 1 year in the bidding firm)**
- **Bachelor of science degree, preferably in computer science or programming related course**
- **1 training or seminar related to research and development**

8. Data Processing Assistants (including checker) (2)

Check data completion and process the data.

Minimum Qualifications

- 2 years relevant experience in **planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects, preferably**

in checking data completion and processing of data (with at least 1 year in the bidding firm)

- Bachelor of science degree, preferably in computer science or programming related course
- 1 training or seminar related to research and development

9. Group Leaders (at Least 1 for Every 5 interviewers)

Assists the field supervisors in field monitoring.

Minimum Qualifications

- **2 years relevant experience in planning, design, management and implementation of customer satisfaction evaluation studies or research & development projects, preferably in field monitoring (with at least 1 year in the bidding firm)**
- **Bachelor of science or Bachelor of arts degree, preferably in business or economics**
- **1 training or seminar related to research and development**

10. Field interviewers (at least 5)

Conducts the interviews/data collection.

Minimum Qualifications

- **2 years relevant experience in conducting interviews/data collection, preferably in customer related survey projects (with at least 1 year in the bidding firm)**
- **Bachelor of science or Bachelor of arts degree, preferably in business or economics**

11. Coders Depends on the Number of Questions to be Coded

Codes verbatim responses.

Minimum Qualifications

- **2 years relevant experience in coding verbatim responses of interviewees, preferably in customer related survey projects (with at least 1 year in the bidding firm)**
- **Bachelor of science or Bachelor of arts degree, preferably in business or economics**

12. Field Quality Checkers/Back Checkers (Depends on the Sample Size);

Should be able to Back-Check at least 30% of the Total Sample Size. Checks quality and validity of the interviews/outputs.

Minimum Qualifications

- **2 years relevant experience in checking the quality and validity of the interviews/outputs, preferably in customer related survey projects (with at least 1 year in the bidding firm)**
- **Bachelor of science or Bachelor of arts degree, preferably in business or economics**

****Positions and/or qualification not mentioned here but present in the latest Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey (CSS) [released September 2019] must also be included.**

BUDGET AND MODE OF PAYMENT

The ABC **NINE HUNDRED FIFTY THOUSAND PESOS (PHP 950,000.00)**, inclusive of VAT and all other applicable government taxes.

The mode of payment shall be made as follows:

1. Fifteen percent (15%) of the Contract Price for advance payment upon written request of the consultant and posting of an irrevocable standby letter of credit issued by a Universal or Commercial Bank with an amount equal to the advance payment. The advance payment shall be offsetted from each subsequent payment.
2. Thirty percent (30%) of the Contract Price upon submission and approval by the owner of the **Inception Report** (includes survey instruments & KII guide questions, indicators/ parameters/ factors, evaluation framework and detailed methodology).
3. Forty percent (40%) of the contract price upon submission of the **Draft Report** on results of the study and presentation materials.
4. The remaining thirty percent (30%) of the Contract Price shall be released under the following conditions:
 - i. Submission of the **Final Report** (includes attachments and documentation report); and
 - ii. Issuance of Certificate of Completion by NDC.

ATTACHMENTS (available upon request)

1. Latest Guide Book for GOCCs or the enhanced standard methodology for the conduct of the CSS (released September 2019);
2. GCG issued survey questionnaire for the conduct of CSS for NDC (released March 20, 2020);
3. Additional guidelines in the conduct of the CSS for 2020 in the GOCC sector (released 14 August 2020); and
4. Additional guidelines in the conduct of the CSS for 2021 in the GOCC sector dated 26 February 2021.

Please note however, that as of this date the GCG has not issued additional guidelines in the conduct of CSS 2022. In the event that new issuance from the GCG is released, the conduct of the CSS 2022 will be governed by this.

EVALUATION PROCEDURE AND CRITERIA

The method of evaluation is Quality-Cost Based Selection (QCBS).

The evaluation and summary of criteria for the Technical and Financial Proposal are as follows:

A. TECHNICAL PROPOSAL (70%) - Minimum of 60%

I. SUMMARY

CRITERIA		Max Score
i.	Firm's work experience on Customer Satisfaction Survey and related studies within the last five (5) years (2017-2022) with a total of at least 5 projects (3 similar and 2 related) completed, with amounts of not less than Php475,000 (for at least one similar project)	45
ii.	Qualifications and competence of personnel to be assigned to the project	40
iii.	Adequacy of the proposed methodology and work plan in responding to the TOR	15
TOTAL		100

B. FINANCIAL PROPOSAL (30%)

Using the formula: $S_f = 100 \times FI/F$

Where:

S_f = Financial Score of the Financial Proposal under consideration

FI = Price of the lowest financial proposal

F = Price of financial proposal under consideration

PERFORMANCE SECURITY

The Winning Bidder shall submit Performance Security as required under Section 54.5 of the 2016 Revised Implementing Rules and Regulations (IRR) of RA 9186, in accordance with Section 39 of this IRR.

A. Eligibility Requirements shall include the following:

1. Valid and current Mayor's Permit (certified true copy)
2. PhilGEPS Registration Certificate (certified true copy) or PhilGEPS Registration Number
3. 2021 Income Tax Return or Latest Business Tax Return (certified true copy)
4. Omnibus Sworn Statement (Notarized and in accordance with GPPB Circular 04-2020 dated September 16, 2020)
5. Curriculum Vitae of the required Evaluation Team (Please refer to the format attached as **ANNEX A.**)

Note: In lieu of the Mayor's Permit and PhilGEPS Registration Number, you may submit a valid Certificate of PhilGEPS Registration (Platinum Membership).

B. Technical Proposal Documents shall include the following:

1. Consultant's Organization and Experience (Brief Description of the background, organization and general experience of the Consultancy Firm)
2. Summary of completed projects undertaken within the last five (5) years (Please refer to the format attached as **ANNEX B.**)
3. Certified True Copy of Certificate of Satisfactory Completion issued by the client for completed projects as follows:
 - 3.1 At least **two (2) certificates of satisfactory completion** for **similar projects or related evaluation studies** conducted. One of which **should have a contract cost equivalent to at least Php475,000.00 (50% of the ABC).**
4. Technical Approach, Methodology and Work Plan for Performing the Assignment
5. Team Composition, Task Assignments and Summary of CV Information
6. Time Schedule for Key Personnel
7. Activity (Work) Schedule

C. Financial Proposal Documents shall include the following:

1. Financial Bid (Inclusive of Taxes)
2. Breakdown of Financial Bid (Rates of the personnel assigned as the Evaluation Team and Applicable Taxes)

SUBMISSION OF PROPOSAL AND REQUIRED DOCUMENTS: August 30, 2022

MODE OF PROCUREMENT: Small Value Procurement

Please submit your **proposal with the required documents** in a sealed envelope at the address stated below:

Name of Bidder:

BIDS AND AWARDS COMMITTEE
National Development Company
7/F NDC Building, 116 Tordesillas St.
Salcedo Village, Makati City
Fax: 8840-4862
Attention: BAC Secretariat

Project Reference Number: MR22-08-114

All prices should be inclusive of VAT and other applicable government taxes. Further, please indicate in the proposal the following:

1. Terms of Payment – As stated in the TOR
2. Delivery Period – 84 Calendar Days (12 weeks) upon receipt of Notice to Proceed

(SIGNED)

AGM SATURNINO H. MEJIA

Chairperson, Bids and Awards Committee

Note: See attached Annex A and B.

ANNEX A**Format of Curriculum Vitae (CV) for the Proposed Professional Staff**Proposed Position: **e.g. Project Manager & Lead Evaluator**

Name of Firm: _____

Name of Staff: _____

Profession: _____

Date of Birth: _____

Years with Firm/Entity: _____ Nationality: _____

Membership in Professional Societies: _____

Detailed Tasks Assigned: _____

Education:*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained using the matrix below]*

School	Date attended	Degree Obtained

*(Provide extra rows if needed)***Trainings/Seminar:***[Summarize the trainings, seminars and symposiums attended, facilitated or conducted, giving course title, dates attended using the matrix below].*

Training	Date attended

*(Provide extra rows if needed)****Similar Position Held on Completed Projects:**

Similar Position Held	Project	Date undertaken	Location	No. of Years
Total				

*(Provide extra rows if needed)****Similar Position Held on Present Projects:**

Similar Position Held	Project	Date undertaken	Location	No. of Years

Total

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(Provide extra rows if needed)

***Similar Position as required in Terms of Reference.**

Languages:

[For each language, indicate proficiency: excellent, good, fair, or poor in speaking, reading, and writing.]

Language	Proficiency

(Provide extra rows if needed)

Professional Regulation Commission (PRC) License, as applicable:

PRC License	License Number / Validity date

(Provide extra rows if needed)

Certification:

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience. Further, the undersigned commits to work for the Project once the contract is awarded to the firm which I work for.

_____ Date: _____

[Signature of staff member]

Summary of Completed Projects

Using the format below, provide a summary of the information of completed projects undertaken by the firm within the last five (5) years. **(Include at least three (3) similar studies/projects in the conduct of customer satisfaction evaluation and two (2) other studies/projects related in nature, and attach at least two (2) certificates of satisfactory completion for similar projects or related evaluation studies conducted. One of which should have a contract cost equivalent to at least Php 475,000.00 (50% of the ABC)**

Project Name/Name of Contract	Name of Client	Location of the Contract / Client Location	Date of Award of the Contract	Start Date (Month/Year)	Completion Date (Month/Year)	Type and Brief Description of Actual Consulting Services	Consultant's Role (whether main consultant, subcontractor or partner in JV)	Amount of Contracts (In Php)	Contract Duration	Documents presented to validate completion or award to the proponent

Printed name and signature of authorized representative