

# REQUEST FOR PROPOSAL

REFERENCE NO.: **MR19-09-152**

We are inviting all interested consultancy firm to submit their best proposal for the **PROCUREMENT OF CONSULTING SERVICES FOR THE PREPARATION AND IMPLEMENTATION OF A STAKEHOLDER SATISFACTION EVALUATION.**

## **A. TERMS OF REFERENCE**

### **I. 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.

On April 2018, the Governance Commission for Government Owned or Controlled Corporations (GCG) released a standard guideline which will govern the conduct of the annual customer satisfaction survey in order to ensure a more organized and efficient implementation of the annual customer satisfaction Survey. Given that NDC is a GOCC under the jurisdiction of GCG, NDC will be adopting the standard survey guideline mandated by the GCG.

### **II. 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 to ISO 9001 mandatory procedures, the specific objectives of the study are the following:

1. Measure the primary customers' (composed of NDC subsidiary/affiliate companies, partners, lessees, financing customers, new project proponents, consultants, service providers, and

suppliers) rating of NDC overall performance. The expected satisfaction rating is at least satisfactory or good from 100% of the respondents.

2. Evaluate NDC performance using the April 2018 guidelines provided by the Governance Commission for Government Owned or Controlled Corporations' (GCG) Standard Methodology for the Conduct of the Customer Satisfaction Survey.

### III. SCOPE OF WORK

The assessment will involve the design, preparation, coordination, implementation and presentation of Customer Satisfaction Evaluation using **quantitative and qualitative** information gathered through Survey and/or Key Informant Interviews (KII) described under the GCG standard customer satisfaction survey methodology. Additional survey instruments or questionnaires shall also be developed for customers not identified in the GCG standard format.

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 2018 NDC client satisfaction survey is to cover the **complete members of NDC primary customers in 2018** with the addition of other stakeholders whose feedback are also needed by NDC.

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, data gathering instruments used, complete transcripts, presentation materials and all reports, in both hard and soft copies, related to 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

#### IV. 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.

## V. TIMELINE

Activities & Deliverables	No. of Weeks
1. Inception meeting and discussion of sampling design, methodology, protocols and work plan  Output: <b>Inception Report</b> (includes survey instruments, KII guide questions, indicators/ parameters/ factors, evaluation framework and detailed methodology)	1
2. Review, add questions, format and translate survey instrument	1
3. Pilot testing of survey instrument and feedback for possible revision	1
4. Finalization of survey instrument	1
5. Recruit, train, and submit list of final field team to be deployed	1
6. Data collection set up (including production and preparation of fieldwork materials)	1
7. Data collection proper	2
8. Data cleaning and validation, computation of descriptive statistics, and presentation of draft report  Outputs: a. <b>Electronic Copy of Consolidated Raw Data &amp;</b> b. <b>Draft report</b> on results of the study and presentation materials	3
9. Revision writing and submission of final report  Output: <b>Final Report</b> (includes attachments and <b>documentation report</b> )	1
<b>TOTAL</b>	<b>12</b>

## VI. 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) certificate 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 Php375,000 (50% of the ABC).

### Research Team

The lead evaluator must be aware of the functions of the GCG and should have proven expertise on the demands of 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. Project Manager & Lead Evaluator (1)**

He/she oversees the entire project and shall be the author of the draft and final reports. He/she can be a research director, associate research director, senior research manager or research manager. He/she should draft, revise and submit the questionnaire, tabulation specifications and report and should be the one to present the research findings to NDC. He/she should also be present during major meetings and trainings done throughout the project.

As the lead evaluator, he/she will be responsible for running the encoded data and converting this into tabulated form upon receipt of the consolidated, cleaned matrix summary of all data. He/she will also run statistical tests needed for the project.

##### *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. Field & Data Processing Supervisor (1)**

He/she assists the Project Manager/Lead Evaluator throughout the project. He/she can be a research executive or senior research executive. He/she can work on the questionnaire, tabulation specifications and report but with the full guidance of the project manager.

As the field supervisor, he/she oversees all tasks related to data collection, which starts from recruitment of field team until the accomplished questionnaires have been received and deemed "clean". He/she 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, he/she is responsible for checking the accomplished questionnaires done by the interviewers. Before any questionnaire is processed for encoding, he/she should check and approve first each questionnaire to make sure that these follow the consistency and cleaning instructions provided.

As the data processing supervisor, he/she oversees all tasks related to data processing, which starts from data encoding to consolidation and tabulation into its matrix summary. He/she is also responsible for the checking of the encoding template and the data churned out by the

encoders before it is processed or tabulated. He/she should be present during the field training and clearing/debriefing when all the consistency checks and cleaning instructions are relayed.

*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

**3. Interviewers & Encoders (at least 5)**

The interviewers are the ones who will interview the respondents and are the ones responsible for encoding the answers from their respective interviews using the encoding template provided by the field and data supervisor.

All of them should be present during the field training to be conducted by the field supervisor.

*Minimum Qualifications*

- Participated in at least one (1) project in conducting interviews and/or face to face survey
- Worked with the bidding firm for at least 6 months
- Bachelor of science degree, preferably in business or economics

**VII. APPROVED BUDGET FOR THE CONTRACT (ABC) AND MODE OF PAYMENT**

The ABC is **SEVEN HUNDRED FIFTY THOUSAND PESOS (PHP750,000.00)**, 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.

## VIII. EVALUATION PROCEDURE AND CRITERIA

1. The method of evaluation is Quality-Cost Based Selection (QCBS).
2. The criteria and rating system for the evaluation of the Technical and Financial Proposals:
  - a. Technical Proposal (70%) – Minimum Technical Score of 60 in order to qualify.
    - a.1. Work experience of the consultancy firm relevant to the job assignment
    - a.2. Qualifications and competence of personnel to be assigned to the project
    - a.3. Adequacy of the proposed methodology and work plan in responding to the TOR
  - b. Financial Proposal (30%)

## IX. 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.

### B. Eligibility Requirements shall include the following:

1. Valid and current Mayor's permit of the Consultancy Firm (certified true copy)
2. PhilGEPS Registration Certificate or PhilGEPS Registration Number of the Consultancy Firm (certified true copy)
3. 2018 Income Tax Return or Latest Business Tax Return of the Consultancy Firm (certified true copy)
4. Omnibus Sworn Statement (notarized)
5. Curriculum Vitae of the required Evaluation Team (Please refer to the format attached as **ANNEX A.**)

### C. 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) certificate of satisfactory completion** for **similar projects or related evaluation studies** conducted. One of which **should have a contract cost equivalent to at least Php375,000.00 (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

**D. 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 (“B TO D”):      September 25, 2019**

**MODE OF PROCUREMENT:    Small Value Procurement**

Please submit your **proposal with the required documents specified in items “B to D”** 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: 840-4862 Attention: BAC Secretariat
Project Reference Number: MR19-09-152

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

**(SGD.) AGM SATURNINO H. MEJIA**  
Chairperson, Bids and Awards Committee

Note: See attached Annex A and B.



### 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
<b>Total</b>				

(Provide extra rows if needed)

#### \*Similar Position Held on Present Projects:

Similar Position Held	Project	Date undertaken	Location	No. of Years
<b>Total</b>				

(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]

