

Terms of Reference

Provision of Services for the Advocacy and Publicity Strategy for the 2020 Census of Population and Housing (CPH)

I. Background and Rationale

The Philippine Statistics Authority (PSA), pursuant to Republic Act No. 10625 (Philippine Statistical Act of 2013), is the lead agency tasked to take an inventory of the population of the entire Philippines. The PSA will conduct the 2020 Census of Population and Housing (2020 CPH) on May 2020. The 2020 CPH, which is a complete enumeration of households in the country, is designed primarily to take an inventory of the population of the entire Philippines. It also collects information about some characteristics of the population such as age, sex, marital status, and highest grade completed. It will be the 15th census of population to be undertaken in the country since the first census in 1903.

To make the general public supportive of the census, everyone needs to be properly informed about both the benefits of a census and about the vital role they play in its success. For the census to succeed, an advocacy and publicity strategy for the 2020 CPH is necessary to provide guidelines on how best to promote census awareness and sensitize the public on the whole census process. It seeks to solicit the support and cooperation of both the internal and external clients of the PSA and the public at large.

Recognizing that stakeholder engagement, communication, and dissemination of the conduct of the census and its results will play a vital role in ensuring that the public gains widespread and sustained awareness of the relevance of the census, the PSA, through the National Censuses Service (NCS), is implementing an advocacy strategy for the 2020 CPH.

The first phase of the communication and stakeholder engagement will feature a launch event, social media engagement and ad placements in government-owned billboards.

PSA deems it necessary to sustain the campaign until the end of the 2020 CPH cycle and broaden its reach through various media/platforms.

I. Objective, Target Market, and Coverage

The PSA 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 the objectives of the 2020 CPH and sustain interest in the census.

The campaign intends to influence the public, as well as the country's leaders and decision makers through a nationwide undertaking across various media channels/platforms, including events.

II. Scope of Services

The Service Provider shall provide the following services:

1. Draw up a comprehensive media plan for 2020 CPH with cost estimates starting the third quarter of CY 2018 covering all major media types, and recommend media plans/strategies for CY 2019 until 2021;
2. Provide creative services covering design and production of initial campaign materials to be used in all media and other activities;
3. Provide creative support for special projects to be initiated by PSA that are related to the campaign; and,
4. Provide regular updates and feedback to PSA on the effectiveness of the campaign through appropriate metrics and feedback generated.

III. Deliverables and Submission Schedule

OUTPUTS/DELIVERABLES	TIME FRAME
1. Inception report and work plan, which <ol style="list-style-type: none"> a) sums up the service provider’s understanding of 2020 CPH communication strategy, assesses its progress thus far, and describes how the service provider intends to achieve the specified communication objectives of 2020 CPH; and 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. 	Within one (1) month from receipt of the Notice to Proceed (NTP)
2. Detailed media plan and strategies for the 2020 CPH beginning third quarter of 2018 until 2021. <ol style="list-style-type: none"> a) The detailed plan should include the following: <ol style="list-style-type: none"> i) 2020 CPH overarching direction and key messages, which should be based on the objectives of the census; ii) stakeholder and audience maps, positioning and programs and priorities for action; iii) proposed activities and materials for specified target audiences (should include sample concepts for materials); iv) implementation schedule; and 	Within 1 month from receipt of NTP

OUTPUTS/DELIVERABLES	TIME FRAME
v) budgetary estimates for the 2020 CPH covering all major media types and activities with wide reach and high relevance.	
b) The detailed plan should also include the following: i) 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 PSA.	Upon approval of the media plan/strategy (Within 2nd month of engagement)
ii) media buying and coordination services for selected media based on approved media plan/strategy for the entire 2020 CPH 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 2nd month of engagement)
3. Terminal Report	Within last week of engagement

IV. 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 PSA in carrying out the required services;
2. Provide creative direction for the advocacy and publicity strategy of 2020 CPH;
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 PSA at least twice a month during project duration to discuss activities, issues and concerns related to the 2020 CPH campaign;
5. Attend meetings/events/seminars/activities that may provide insights useful to the project such as presentation to the management;
6. Submit reports detailing work progress, issues and concerns, and recommended next steps in relation to the project at no additional cost to PSA;

7. Be required to sign a Confidentiality and Non-Disclosure Agreement (CNDA) upon receipt of the Notice of Award (NOA).

V. Responsibilities of PSA

The PSA shall:

1. Provide all information and materials needed to accomplish the scope of work, including the 2020 CPH Focus Group Discussion/Consultation results, thematic papers, PSA branding guidelines, communication plan, among others once the Service Provider has signed a CNDA;
2. Provide 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.

VI. Approved Budget for the Contract (ABC)

The ABC for the provision of services under this TOR is TWO MILLION PESOS (**PhP2,000,000.00**), inclusive of all applicable Government taxes and charges. Refer to **Annex A** for breakdown of the ABC.

VII. 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 advocacy and publicity 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.

VIII. 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 (GPR), and its Revised Implementing Rules and Regulations (IRR).

IX. 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.

Contract Milestones	% of the Total Budget
<p>Upon acceptance of inception report and work plan (output/deliverable #1), which</p> <ul style="list-style-type: none"> • sums up the service provider’s understanding of the 2020 CPH communication strategy, assesses its progress thus far, and describes how the service provider intends to achieve the specified communication objectives of 2020 CPH; and • specifies activities and tasks to be undertaken by the Service Provider in fulfilling the project’s scope of services and achieving the communication objectives. 	<p>10%</p>

<p>Upon acceptance of detailed media plan for the third quarter of CY 2018 and recommended media strategies for 2019 until 2021 (<i>output/deliverable #2</i>).</p> <p>a) The detailed plan for 2018 should include the following:</p> <ul style="list-style-type: none"> • 2020 CPH overarching direction and key messages, which should be based on the objectives of the census; • stakeholder and audience maps, positioning and programs and priorities for action; • proposed activities and materials for specified target audiences (should include sample concepts for materials); • implementation schedule; and • budgetary estimates for the 2020 CPH covering all major media types and activities with wide reach and high relevance. <p>b) The detailed plan should also include the following:</p> <ul style="list-style-type: none"> • 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 PSA. • media buying and coordination services for selected media based on approved media plan/strategy for the entire 2020 CPH engagement period. This shall include coordination and negotiation for media rates, spots, bonuses, etc., inclusive of all agency service fees. <p>c) Terminal Report</p>	<p>40%</p>
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Contract Milestones	% of the Total Budget
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 1, and 2</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 # 3</i>)	10%

X. Submission of Proposals

Interested Strategic Communications Firm / Media Planning and Placement Agency Advertising Agency must secure Bidding Documents and submit proposals to the PSA Bids and Awards Committee (BAC).

A detailed proposal meeting the above requirements must be prepared and presented to the BAC. 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.

XI. 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 2020 CPH;
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.

XII. Ownership

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

XIII. 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 PSA, 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 PSA, 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 PSA shall be valid for the duration of the contract.

XIV. Penalties and Liquidated Damages

The selected Service Provider shall be subjected to assessment by the PSA 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 PSA 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 PSA 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 PSA 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 PSA 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 PSA.

ANNEX A

Breakdown of the Approved Budget of Contract (ABC)

Provision of Services for the Advocacy and Publicity Strategy for the 2020 Census of Population and Housing (2020 CPH)

Outputs/Deliverables	Amount
1. Inception report and work plan, which <ul style="list-style-type: none"> • sums up the Service Provider’s understanding of the 2020 CPH communication strategy, assesses its progress thus far, and describes how the service provider intends to achieve the specified communication objectives of 2020 CPH; and • specifies activities and tasks to be undertaken by the Service Provider in fulfilling the project’s scope of services and achieving the communication objectives. 	
2. Detailed media plan for the third quarter of CY 2018 and recommended media strategies for 2019 until July 2020. <p>a) The detailed media plan for the third quarter of CY 2018 should include the following:</p> <ul style="list-style-type: none"> • 2020 CPH overarching direction and key messages, which should be based on the objectives of the census; • Stakeholder and audience maps, positioning and programs and priorities for action; • Proposed activities and materials for specified target audiences; • Sample concepts of proposed materials • Implementation schedule; and • Cost estimates for the third quarter, CY 2018, covering all major media types and activities with wide reach and high relevance. <p>b) The strategies for 2019 until July 2020 should build on the second semester 2018 plan and anticipate new developments.</p>	
3. Concepts and preliminary production of materials for dissemination and/or activities for CY 2018 across identified media/platforms in the approved media plan/strategy, subject to approval of the PSA.	
4. Terminal Report with assessment/evaluation of the effectiveness of the entire campaign and recommended adjustments, if needed for 2019 until July 2020.	
GRAND TOTAL	2,000,000

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

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 PSA 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 Advocacy and Publicity Strategy for the 2020 Census of Population and Housing (2020 CPH)

Company Name:	
Office Address:	
Telephone Number:	
Fax:	
Email :	
Website:	

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 general public including 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*

$\text{Financial Capacity} = \frac{(\text{Current Assets} - \text{Current Liabilities}) - (2 \text{ months cost of all ongoing and committed projects})}{2 \text{ months cost of the Approved Budget for the Contract (ABC)}}$
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**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 Advocacy and Publicity Strategy for the 2020 Census of Population and Housing (2020 CPH)

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

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

