

**CONSULTING SERVICES
FOR THE 2020 BCDA STAKEHOLDER SATISFACTION STUDY
Terms of Reference (TOR)**

I. RATIONALE

The Bases Conversion and Development Authority (BCDA) is an instrumentality of the government vested with corporate powers under Republic Act (RA) No. 7227, as amended, mandated to transform and develop former military bases and properties into premier centers of economic growth. BCDA is committed to fulfill its mandate to its stakeholders and beneficiaries, particularly to its major stakeholder, the Armed Forces of the Philippines (AFP).

BCDA acknowledges the importance of stakeholder satisfaction as it pursues its mandate of development. By measuring stakeholders' feedback toward its programs and services, BCDA has the basis for necessitating continuous improvements in its operations and services. Among BCDA's communication objectives is to create a feedback mechanism among its stakeholders on BCDA's performance to keep its corporate reputation and image in check.

This will be done through the conduct of the BCDA 2020 Stakeholder Satisfaction Study—otherwise known as the Customer Satisfaction Survey as required by the Governance Commission for Government Owned or Controlled Corporations (GCG)—which entails scholarly research on the satisfaction level of stakeholders towards BCDA, including its programs, projects and staff.

Under GCG Memorandum Circular (M.C.) No. 2012-07 or the Code of Corporate Governance, GOCCs are required to ensure integrity in dealing with customers; operate a highly effective and efficient organization, focused on meeting customer objectives; and operate policies of continuous improvement, of both processes and the skills of the staff to ensure that it continues to add value to its customers' undertakings.

The survey is one of the performance indicators under GCG's Performance Evaluation System (PES) 3 and is one of the monitoring tools to measure how GOCCs relate with their customers as this provides tangible and verifiable data on how GOCCs deliver their services.

It is imperative that the BCDA 2020 Stakeholder Satisfaction Study be conducted and interpreted by independent third party research professionals and experts and presented in relation to baseline or results of previous BCDA Stakeholder Satisfaction Studies.

II. BACKGROUND

The conduct of the BCDA 2020 Stakeholder Satisfaction Study, otherwise known as the Customer Satisfaction Survey, is guided by the following:

A. Republic Act No. 10149 (RA No. 10149): “GOCC GOVERNANCE ACT OF 2011”

“An act to promote financial viability and fiscal discipline in government-owned or -controlled corporations and to strengthen the role of the state in its governance and management to make them more responsive to the needs of public interest and for other purposes”

The Act maintains that the State recognizes the role of GOCCs in achieving sustainable and inclusive growth in aid of economic development. With this recognition is the need for the State to ensure that the operations of GOCCs are rationalized and monitored centrally so that assets and resources are used efficiently; that the governance of GOCCs is carried out in a transparent, professional, fully accountable manner and with competence; and that a reporting and evaluation system is enforced.

Republic Act (R.A.) No. 10149 mandates the GCG to establish a performance evaluation system (PES) which shall apply to all GOCCs in general and to the various GOCC classifications. RA 10149 mandates GCG to actively exercise the State’s ownership rights through the institutionalization of the PES.

B. Executive Order 605, s. 2007

“INSTITUTIONALIZING THE STRUCTURE, MECHANISMS AND STANDARDS TO IMPLEMENT THE GOVERNMENT QUALITY MANAGEMENT PROGRAM, AMENDING FOR THE PURPOSE ADMINISTRATIVE ORDER NO. 161, S. 2006”

EO 605 directs: “All departments and agencies...to adopt the ISO 9001:2008 Quality Management Systems as part of the implementation of a government-wide quality management program. The quality management systems shall be certified for demonstrated conformity with ISO 9001:2008 and the applicable Government Quality Management Systems Standards (GQMSS), with priority to be given to frontline services.”

C. ISO 9001:2015

ISO 9001:2015 is the latest version of ISO 9001:2008. According to the website of the International Organization for Standardization (www.iso.org), “ISO 9001:2015 specifies requirements for a quality management system when an organization:

- a. needs to demonstrate its ability to consistently provide products and services that meet customer and applicable statutory and regulatory requirements; and
- b. aims to enhance customer satisfaction through the effective application of the system, including processes for improvement of the system and the assurance of conformity to customer and applicable statutory and regulatory requirements.”

D. Standard Guidelines and Recommendations of the GCG:

a. GCG Memorandum Circular (M.C.) No. 2013-02 establishes the Performance Evaluation System for the GOCC Sector

In order to measure effectiveness of service delivery, the GCG directs all GOCCs to implement customer and/or stakeholder satisfaction surveys conducted by independent third parties from the private sector.

The (GCG) created a Performance Evaluation System which discusses extensively on the Social Impact Perspective, which “refers to the national and community-wide impact (socio-economic) of the services delivered by the GOCC.” It further explains though that “the GOCC may or may not include a social impact perspective if its social impact cannot be differentiated from its outcome in the stakeholder perspective.”

The variables described herein are :

1. Timeliness
2. Ease of Access
3. Staff
4. Quality of Service
5. Joint Venture/Leasing/Sale Activities
6. Complaints Handling and Records Keeping
7. Information and Communication
8. Facilities
9. Outcome Achieved

Guidebook for GOCCs Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey (Starting 2020)

b. The Guidebook refers to the standard methodology and guidance on data gathering methods, sampling procedure, data collection and administration of the data collection instrument, data processing, analysis, formulation of the project team and documentation. The Guidebook can be accessed online via: <https://gcg.gov.ph/files/0Pcv1VVgGf08JtLrlmIE.pdf>.

c. Survey questionnaires for the Conduct of Customer Satisfaction Survey Starting 2020.

The GCG transmitted survey questionnaires for business organization customers of BCDA. The GCG requires strict adherence to the guidelines in the implementation of the annual customer survey. Modification or alteration of the transmitted questionnaires is prohibited. GOCCs however may add questions specific to their services in accordance with guidelines prescribed.

d. Classifications of GOCCs According to Survey Methodology (Starting 2020)

Among respondents of BCDA to the 2020 Customer Satisfaction Survey are business organizations (foreign and local companies) and government agencies (e.g. AFP) as indicated in the GCG Classification. The prescribed methodology is telephone or face-to face interview. The Classification can be accessed online via <https://gcg.gov.ph/files/Kba69mewyrgfv6xS6k2O.pdf>.

e. GCG Memorandum Circulars
GCG MC No. 2012-07 or the Code of Corporate Governance

Under this circular, GOCC Governing Boards are required to: (a) Ensure integrity and honesty in dealings with customers and operate a highly effective and efficient organization, focused on meeting customer objectives with the aim of providing services which give fair value and consistent quality, reliability and safety in return for the price paid for the same. (b) Operate policies of continuous improvement, of both processes and the skills of the staff, to take best advantage of advances in all aspects of society in order to ensure that it continues to add value to its customers' businesses.

GCG MC No. 2013-02 (Re-Issued) and 2017 -02

Under these circulars, the Performance Evaluation System is discussed. GCG made it mandatory for GOCCs to conduct an annual Customer Satisfaction Survey (CSS) as one of the performance indicators under the said Performance Evaluation System (PES). The CSS serves as one of the monitoring tools to measure how GOCCs relate with their customers as this provides tangible and verifiable data on how GOCCs deliver their services.

III. BUDGET:

The Approved Budget of the Contract (ABC) is **Eight Hundred Thousand Pesos Only (Php800,000.00)**, inclusive of all applicable government taxes and fees and incidental expenses.

IV. OBJECTIVES:

The objectives of the Consulting Services for the Stakeholder Satisfaction Study are:

- A. To generate feedback from identified stakeholders of BCDA;
- B. To enable BCDA to measure its performance in delivering its service to stakeholders based on satisfaction metrics and the variables identified by GCG— Timeliness; Ease of Access; Staff; Quality; and, Outcome;
- C. To identify specific actions that BCDA can take to improve its performance and incorporate these as part of strategic planning;
- D. To provide benchmarks on which to evaluate actions BCDA takes;

- E. To help identify organizational risks and opportunities guided by ISO 9001 standards;
- F. To comply with good governance conditions prescribed by the GCG and ISO 9001 standards.

V. SCOPE OF WORK/TECHNICAL SPECIFICATIONS AND DELIVERABLES:

A. The CONSULTANT shall perform research, data gathering, data processing, analysis and assessment for the BCDA 2020 Stakeholder Satisfaction Study, in accordance to the Guidebook for GOCCs Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey (Starting 2020) and the Classifications of GOCCs According to Survey Methodology (Starting 2020),” which forms part of the Terms of Reference (TOR). The study shall include the following activities:

1. Development of the Research Design and Methodology based on Guidelines of the Governance Commission on GOCCs (GCG). The Consultant shall submit the research design and methodology, subject to BCDA review and approval prior to implementation;
2. Development of the study based on:
 - a. Baseline data provided by previous BCDA Stakeholder Satisfaction Studies;
 - b. Performance measures and good governance conditions prescribed by the GCG; and,
 - c. ISO 9001:2015 standards.
3. Design, formatting and reproduction of research instruments compliant with the Guidelines of the GCG, subject to review and approval of BCDA;
4. Conduct of research sampling and data-gathering methods that are compliant with the Guidelines of the GCG and can adequately cover the objectives of the BCDA Stakeholder Satisfaction Study;

B. The CONSULTANT shall perform data collection and data processing necessary for the BCDA 2020 Stakeholder Satisfaction Study based on the Guidebook for GOCCs Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey (Starting 2020), the Classifications of GOCCs According to Survey Methodology (Starting 2020) and the GCG-transmitted survey questionnaires for the Conduct of Customer Satisfaction Survey as attached, as part of the TOR. The study shall include the following activities:

1. Employment of appropriate sampling method prescribed in the GCG Guidelines. Probability sampling in identifying the respondents based on customer universe provided by BCDA. The employment of purposive sampling may include multi-stage random sampling, systematic random sampling, and cluster sampling to ensure that the sample is representative of the customer population of BCDA;

2. Data collection shall be done by trained field interviewers using a structured pen and paper questionnaire following GCG's prescribed methodology;
 3. Attendance in meetings and conduct of interviews by trained field interviewers using a structured pen and paper questionnaire, site visits and survey implementation (guided or online) in BCDA's areas of operations such as Pampanga, Tarlac, Bataan, La Union, Baguio and Metro Manila shall be part of the data gathering activities;
 4. Correspondence with respondents in the most professional manner, and pursued using the most appropriate form (i.e. formal communication, online communication, among other proper channels);
 5. Processing of existing data for report preparation in aid of determining satisfaction of stakeholders within the prescribed period of the study;
 6. Utilization of data collection instruments through a structured pen and paper questionnaire to ensure consistency all throughout the project and with the least possible interviewer bias. The questionnaire may be composed of two (2) sections :
 - a. Screener
 - b. Main questionnaire
 7. Determine and report to BCDA the overall satisfaction/dissatisfaction rating, the reasons for the satisfaction/dissatisfaction rating and the factors contributing to the satisfaction/dissatisfaction rating ;
- C. The CONSULTANT shall perform data analysis and provide recommendations for consideration of top management in pursuing its plans and programs for stakeholders—guided by GCG Guidelines and the ISO 9001: 2015 standards.
1. Comparative analysis with previous results shall be made part of the new study, as applicable.
 2. Analysis of survey results shall be based on the analysis plan provided in the GCG guideline. The analysis should include a reading of the following segments:
 - a. Total
 - b. By area (for nationwide coverages)
 - c. By customer type
 1. General public
 2. Businesses
 - d. By type of service availed
 - e. By rating
 1. Positive raters
 2. Negative raters

3. Preparation of in-depth and comprehensive recommendations— focused on the needs of stakeholders.

D. The CONSULTANT shall prepare, present and submit to BCDA top management the BCDA Stakeholder Satisfaction Study with supporting comprehensive reports, based on GCG guidelines and BCDA requirements.

E. The CONSULTANT shall conduct a two-part study to give an overall picture of stakeholder satisfaction rating and feedback from BCDA’s various stakeholders apart from those identified by GCG.

1. The first phase shall focus on the GCG-prescribed guidelines, requirements and recommended respondents (business partners, government officials, etc.). The results of the first phase of the study shall be submitted to the GCG on January 30, 2021.

The GCG provided a list of required documents for submission per activity:

ACTIVITY	DOCUMENT FOR SUBMISSION	DUE
Project Implementation	Supervision/Observation Report Fieldwork Progress Report	Quarterly Monitoring Report
Back-checking & spot checking	Back-checking and Spot-checking Report	Quarterly Monitoring Report
Data processing	Spot-checking Report for Data Processing Data Quality Control Report	Annual Accomplishment Report
Analysis	Final Report	Annual Accomplishment Report

The following analyses are the minimum required information to be presented in the Final Report:

- a. Data-gathering methodology (i.e. sampling procedure, total primary customers, sample size used, survey methodology, frequency of data collection)
- b. Percentage of satisfied customers using Top 2 Box (Very satisfied and Satisfied)
- c. Averaging of the Overall Satisfaction Rating
- d. Comparison of Current Year Ratings versus previous year ratings

- e. Crosstabs of the reasons for overall satisfaction rating against type of raters (positive and negative) to determine the Top Reasons for Satisfaction and top reasons for dissatisfaction
- f. Deriving Importance (Note: Not applicable to customer types with sample size of $n \leq 30$)
- g. Plotting in a scatter diagram

2. The second phase shall include other BCDA stakeholders, as identified in previous studies.

F. The CONSULTANT shall adhere to agreed timelines.

G. The CONSULTANT shall shoulder the compensation of the project team and support staff that will be engaged for the conduct of the Study, as well as the expenses for meals, transportation, and additional accommodation, if in case the BCDA staff house is unavailable on required dates.

II. METHODOLOGY

A. The prospective CONSULTANTS shall be evaluated based on a Quality-Cost Based Evaluation (QCBE) as prescribed in Section 33.2.1.B of the IRR of RA 9184.

B. Each CONSULTANT shall submit its technical and financial proposals simultaneously in separate sealed envelopes.

C. The technical proposal together with the financial proposal shall be considered in the evaluation of consultants. The technical proposals shall be evaluated first using the criteria in Section 33.2.2 of the IRR of RA 9184. Only the financial proposals of consultants who meet the minimum technical score of 70% shall then be opened.

D. The financial proposal will be computed in the following manner:

- 1. The CONSULTANT with the lowest financial proposal gets 100 points.
- 2. The scores of the other CONSULTANTS will be computed using the formula:

$$S_f = 100 \times F_1/F$$

Where S_f is the financial score, F_1 is the lowest financial proposal and F is the financial proposal for consideration.

E. The weight of the technical criteria together with the weight given to the financial proposal shall add to one hundred percent (100%).

F. Each CONSULTANT shall be evaluated according to BCDA’s Criteria for Determining the Highest Rated Bid. Shown below are percentage values for the financial proposal and the technical proposal and the breakdown of values.

Evaluation Criteria	Weight	Minimum Technical Score
Technical Proposal	85%	
Applicable Years of Experience of the Consultant/Firm (20%)	20%	
Similar projects completed (20%)	20%	
Qualification of personnel who shall be assigned to the project (20%)	20%	
Research Design (40%)	40%	
Financial Proposal	15%	
TOTAL SCORE	100%	70%

The **Minimum Technical Score** of 70% should be met.

G. The average score of each qualified CONSULTANT’S technical proposal will be multiplied with the percentage value allowed as weight for Technical Proposals. The score earned by each CONSULTANT’s financial proposal will also be multiplied with the percentage value allowed as weight of the Financial Proposal. The sum of both products becomes the total score of each CONSULTANT. The formula is shown below:

$$S = S_t \times T\% + S_f \times F\%$$

Where **S** is the Total Score; **S_t** is the technical score; **S_f** is the financial score; **T** is the weight given to the Technical Proposal and **F** is the weight given to the Financial Proposal.

H. CONSULTANTS shall then be ranked in descending order based on the combined numerical ratings of their technical and financial proposals, from which the highest rated bid will be identified.

I. The financial proposals shall not exceed the approved budget for the contract and shall be deemed to include the cost of all taxes, duties, fees, levies and other charges imposed under applicable laws.

J. The conduct of Small Value Procurement for the Consulting Services for the BCDA 2020 Stakeholder Satisfaction Study may be delegated to the Public Affairs Department (end-user unit) as duly authorized by the Bids and Awards Committee for Consultancy. This is in accordance with Section 2(c) of the Guidelines for Shopping and Small Value Procurement by the Government Procurement Policy Board (GPPB) and Annex H of the IRR 9184.

K. For recording and monitoring purposes, all awards shall be immediately reported with all supporting documents to the Head of the Procurement Entity, through the BAC-C, to ensure compliance with all the conditions and requirements provided for under R.A. 9184, its IRR and related guidelines.

III. MINIMUM QUALIFICATIONS OF THE CONSULTANT

A. The CONSULTANT must strictly be a reputable research and/or communications firm which has been in operations for at least two (2) years. In the case of joint ventures, the lead consulting firm should have at least two (2) years of business operation.

B. The **research team** must be composed of the following four (4) key members: **OVERALL PROJECT MANAGER, RESEARCH EXECUTIVE, DATA PROCESSING MANAGER AND FIELD MANAGER.**

C. The identified members of the proposed research team must have at least three (3) years experience in communications research as related to his function in the team.

D. The identified members of the proposed research team must have handled at least three (3) research projects which are similar in nature to the requirement (e.g. evaluative research, survey, stakeholder relations studies, etc.) in a capacity related to his/her function in the team.

E. The CONSULTANT must provide the necessary manpower support for the conduct of the BCDA 2020 Stakeholder Satisfaction Study, as required in the GCG guideline.

F. The CONSULTANT must be registered online with the Philippine Government Electronic Procurement System (<http://www.philgeps.gov.ph>) as a legitimate service provider for government requirements. The CONSULTANT is mandated to register with the PhilGEPs and provide a PhilGEPs Registration number as a condition for award of the contract.

G. The CONSULTANT shall be assessed based on the most favorable compliance with the criteria.

IV. MINIMUM REQUIREMENTS OF THE CONSULTANT

A. Technical Proposal:

The CONSULTANT is required to submit the following documents described in Annex H of the Revised IRR of RA 9184 under "Appendix A: Documentary Requirement of Alternative Methods of Procurement as bases for technical evaluation by BCDA.

- Annex A: **Valid and current Mayor’s Permit (city or municipal)/Municipal License**, where the principal place of business of the prospective bidder is located.
- Annex B: **Valid Tax Clearance**
- Annex C: **PhilGEPS Registration Number**
- Annex D: **Company Profile**
- Annex E: **List of similar ongoing and completed projects of the firm** from September 15, 2018 to present (Technical Proposal Form 2)
- Annex F: **CV of Consultant’s Assigned Key Team Members**
Each CV should show the length of experience and a list of ongoing and completed projects handled from September 15, 2018 **until the present** (Technical Proposal Form 2)
- Annex G: **Omnibus Sworn Statement** (Technical Proposal Form 3)
- Annex H: **2019 Income/Business Tax Return**

B. Financial Proposal :

The CONSULTANT is also required to submit its **Financial Proposal in a separate sealed envelope**. The financial proposals shall not exceed the approved budget for the contract and shall be deemed to include the cost of all taxes, duties, fees, levies and other charges imposed under applicable laws. Only the financial proposals of the consultants who meet the minimum technical score of 70% will be opened.

C. Sealing of Proposal:

The CONSULTANT shall enclose its technical proposal and other documentary requirements (Annexes A to H) in one sealed envelope marked “TECHNICAL PROPOSAL,” and the financial proposal in **another** sealed envelope marked “FINANCIAL PROPOSAL.” Both envelopes will be enclosed in an outer envelope marked “BIDDING PROPOSAL FOR CONSULTING SERVICES FOR THE BCDA 2020 STAKEHOLDER SATISFACTION STUDY.”

V. TERMS OF PAYMENT

For the services rendered under the Contract, the CONSULTANT shall be paid the maximum amount of Eight Hundred Thousand Pesos (Php800,000.00), or the total amount

indicated in the bid but not higher than the ABC, which is inclusive of all applicable taxes, fees and incidental expenses.

The CONSULTANT shall be paid in the following terms:

20% upon approval of the survey questionnaire

30% upon completion, submission to and acceptance by BCDA of the report on Phase 1 of the study

50% upon submission to and acceptance by BCDA of the Final Report on the BCDA 2020 Stakeholder Satisfaction Study.

VI. LIQUIDATED DAMAGES

The CONSULTANT obligates itself to perform and complete all the Services within the period specified in Annex "C" beginning from the starting date exclusive of such extensions of time as may be mutually agreed upon in writing. Should the CONSULTANT fail to complete the Services within the stipulated time, liquidated damages, not by way of penalty, shall be paid to BCDA by the CONSULTANT in an amount equal to one-tenth of one percent (1/10 of 1%) of the total Contract price minus the value of the completed portions of the Contract certified by BCDA for each calendar day of delay until the Services are completed.

VII. SERVICES

A. Standard of Service

The CONSULTANT shall fulfill its obligations under the Contract by using its technical expertise and according to the best-accepted professional and industry standards. The CONSULTANT shall exercise all reasonable skill, care, diligence, and prudence in the discharge of the duties agreed to be performed and shall always work in the best interest of BCDA. To attain these, the CONSULTANT shall provide additional personnel with sufficient qualifications and experience to ensure the full and satisfactory accomplishment of the required services/undertakings.

The services shall be conducted by the CONSULTANT in accordance with the instructions or directions made or to be made by the BCDA at any time before its completion. The CONSULTANT shall conduct regular consultation with BCDA in relation to the undertaking of its responsibilities under the Contract.

B. Confidentiality Clause

The CONSULTANT shall hold and maintain confidential all materials and information which shall come into its possession, or knowledge in connection with the Contract or its performance, and not to make use thereof other than for the purpose of the Contract.

After the completion or termination of the Contract, all materials, data, proprietary information and other related documents provided to the CONSULTANT and which have been derived in relation to and as a consequence of the implementation of the Contract, shall be immediately turned over to BCDA without need of demand.

The CONSULTANT undertakes that it shall make appropriate instructions to its employees who need to have access to such information and materials to strictly observe the confidentiality thereof.

The CONSULTANT shall likewise oblige the supplier/service provider to be bound by this confidentiality.

The obligation of the CONSULTANT under this Section shall remain effective even after the termination of this Contract.

Any violation of this Article by the CONSULTANT shall make him liable to BCDA for the penalty equal to ten percent (10%) of the total consideration stipulated herein.

C. Reservation Clause

BCDA has the right to reject any and all bids, declare a failure of bidding, or award the contract in the following situations:

1. If there is prima facie evidence of collusion between officers or employees of BCDA, or between the BAC or any of its members and any of the bidders, or if the collusion is between or among the bidders themselves, or between a bidder and a third party, including any act which restricts, suppresses or nullifies or tends to restrict, suppress or nullify competition;
2. If the BAC found to have failed in following the prescribed bidding procedures; or,
3. For any justifiable and reasonable ground where the award of the contract will not redound to the benefit of BCDA, as follows:
 - a. If the physical and economic conditions have significantly changed so as to render the project no longer economically, financially, or technically feasible, as determined by BCDA;
 - b. If the project is no longer necessary as determined by BCDA;
 - c. If the source of funds for the project has been withheld or reduced through no fault of BCDA.

D. Corrupt, Fraudulent, Collusion and Coercive Practices

Any attempt by a bidder to influence the BAC or its authorized representatives in the evaluation of the bids or contract award decision shall result in the rejection of its bid or

revocation of award as the case may be, and the implementation of other sanction as remedies provided by law.

E. CONTRACT TERM

This Contract shall become effective for a period of six (6) months commencing from the date stated in the Notice to Proceed until the approval of the Final Report by BCDA.