CITEM.BAC.TP.021 REV 1

Republic of the Philippines

Department of Trade and Industry

CENTER FOR INTERNATIONAL TRADE EXPOSITIONS AND MISSIONS

Golden Shell Pavilion, Roxas Blvd. Cor. Gil Puyat Ave., Pasay City

Solicitation No.: CITEM-2022-0046

REQUEST FOR QUOTATION (NEGOTIATED PROCUREMENT – SMALL VALUE PROCUREMENT)

The Center for International Trade Expositions and Missions (CITEM) invites all interested parties to submit quotation for:

PROCUREMENT OF THE SERVICES OF A MARKETING RESEARCH/SURVEY COMPANY TO ADMINISTER, GENERATE, AND INTERPRET RESULTS OF THE CUSTOMER SATISFACTION SURVEY FOR 2022 CITEM'S SIGNATURE EVENTS

(Please see attached Request for Quotation Form for more details.)

| Approved Budget for the Contract | : | PHP 325,000.00 |
|---|---|----------------------|
| Pre-bid Conference | : | 05 May 2022, 02:00PM |
| Deadline of Submission of Eligibility Documents, Financial Bid and Qualitative Evaluation Documents | : | 10 May 2022, 5:00PM |
| Opening of Qualitative Evaluation Documents | : | 10 May 2022, 5:00PM |
| Opening of Eligibility Documents and Financial Bid | : | 12 May 2022, 02:00PM |

Conduct of Pre-bid Conference and Opening of Bids shall be held virtually thru Microsoft Teams or Zoom and shall be open to all prospective bidders. Link of the Pre-bid Conference and Opening of Bids may be requested through the BAC Secretariat at citembac@citem.com.ph.Link shall be released on the actual day of procurement schedule.

The Notice of Award shall only be issued to the lowest calculated and responsive bidder who has complied with the following documentary requirements below, submitted in an enclosed, sealed and properly labeled envelope or compressed folder:

Eligibility Documents (1st Envelope / Compressed Folder)

- 1. Mayor's Permit for the current year or for individuals, BIR Certificate of Registration
 - Expired Mayor's permit with Official Receipt of renewal application shall be accepted as alternate document during community quarantine or similar restrictions declared, in accordance with GPPB Resolution 09-2020. However, a valid Business or Mayors permit must be submitted after award of contract but before payment.
- 2. Valid PhilGEPS Registration Number (evidenced by a certificate or screen shot)

PhilGEPS Certificate of Platinum Membership may be submitted in lieu of Mayor's Permit and PhilGEPS Registration Number.

- 3. Notarized Omnibus Sworn Statement
 - Unnotarized Omnibus Sworn Statement subject to compliance therewith after award of contract before payment shall be accepted as alternate documentary requirement during community quarantine or similar restrictions declared, in accordance with GPPB Resolution 09-2020.
- 4. Notarized Special Power of Attorney, Notarized Secretary's Certificate or Board/Partnership Resolution for partnership, corporation, cooperative, or joint venture, whichever is applicable
 - Unnotarized Special Power of Attorney or Unnotarized Secretary's Certificate or Board/Partnership Resolution are likewise accepted in accordance with ARTA Advisory No. 01 series of 2020 on the Advisory for the Adoption of Fast-Track Measures during the COVID-19 State of Calamity.

Financial Bid (2nd Envelope / Compressed Folder)

• Quotation using the attached Request for Quotation (RFQ) Form duly signed by the authorized representative.

Qualitative Evaluation Documents (3rd Envelope / Compressed Folder)

- Portfolio of ongoing and completed government and private contracts and relevant certifications indicating industry experience in conducting stakeholder satisfaction surveys and related research, from formulating the methodology to analysis and report presentation.
- Certificates of Project Completion showing satisfactory delivery of service
- Proof of membership or certificate of good standing in relevant societies is required to substantiate affiliation
- Curriculum Vitae of the personnel to be assigned in the Project indicating:
 - i. Years of work experience conducting surveys or qualitative and quantitative research in customer/stakeholder satisfaction
 - ii. Work experience/portfolio, certification, or a combination thereof, in database creation, data filing, and statistical analyses of large data sets
 - iii. Work experience/portfolio, publication in research journals or other media that demonstrate excellent communication skills and statistical survey report writing (by any member of the Project Team)

To encourage the sanctity of the bids, bidders must submit these documents separately, on the above stated date and time, either on the following:

- a. Physical Submission at the CITEM Office, Golden Shell Pavilion, Roxas Blvd. cor. Gil Puyat Ave., Pasay City, or
- b. Online submission to the BAC Secretariat through email at citembac@citem.com.ph. A password protection maybe inflicted in the compressed folders to ensure security of the documents. The password must be disclosed an hour before the date and time of the Opening of Qualitative Documents, Eligibility Documents, and Financial Bid as indicated above.

CITEM-BAC reserves the right to reject any or all bids disadvantageous to, waive any formality or accept such bids as may be considered advantageous to the government. Further, CITEM-BAC assumes no obligation whatsoever to compensate or indemnify the bidders for expenses or losses that may be incurred in participating in this bidding.

For inquiries, please contact the CITEM Bids and Awards Committee Secretariat, at telephone no. (02) 8-831-2201 local 309/294 or email at citembac@citem.com.ph.

ATTY. ANNA GRACE I. MARPURI Chairman, Bids and Awards Committee



CITEM.BAC.FR.009 REV 1

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| ITER FOR INTERNATIONAL TRADE EXPOSITIONS AND MISSIONS den Shell Pavilion, Roxas Blvd. Cor. Sen. Gil Puyat Avenue, Pasay City Tel.: (632) 8-831-2201 local 309/294 E-mail: citembac@citem.com.ph | PHILIPPINES |
|--|-------------|
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| _ | RI | EQUEST FOR QUOTATION | |
|---------------------------------------|--|--|---|
| | with ABC of Php 50,001 and abo eal Property and Venue | ove ☑ Small Value Procurement with ABC ☐ Others: | of Php 50,001 and above |
| | | | Date: 29 April 2022 |
| Company Name | :: | <u> </u> | RFQ No.: 2022-0046 |
| | | | |
| ontact No.: | | | |
| | at the quotation be sealed, signe | sible price(s) for the following article(s)/work(s) which and an envelope or compressed fold | |
| Pre-bid Confer | ence:05 May 2022 | Time: 02:00 PM | Venue: Zoom |
| | | nancial Bid, and Qualitative Evaluation Documents: $\underline{10~\mathrm{M}}$ | ay 2022 Time: <u>05:00 PM</u> |
| | pening of Qualitative Evaluation Docu pening of Eligibility Documents and Fi | | Venue: Zoom |
| scriedule of O | bening of Engionity Documents and F | ilialicial Biu. 12 May 2022 Tillie. 02.00 Fivi | venue. <u>Zoom</u> |
| QTY UNIT | ARTICLE / WO | DRK / DESCRIPTION / SPECIFICATION | UNIT PRICE AMOUNT |
| 1 Lot | GENERATE, ANI CUSTOME FOR 2022 CI Please see attach | TEY COMPANY TO ADMINISTER, D INTERPRET RESULTS OF THE R SATISFACTION SURVEY TEM'S SIGNATURE EVENTS Med Term of Reference for more details. | |
| Payment will upplier. Any alteration | litions: od: working days upon accept be Inclusive of Value Added Tax. be processed after receipt of involves, erasures or overwriting shall be | tance of Purchase/Job Order. Dice. Other terms of payment will be based on the Covalid only if they are signed or initialed by the bidder or within 3 Days after receipt of notice. | |
| | reserves the right to reject any or a | Ill bids offer and waive any defects therein and accept b | id/s it may consider advantageous |
| | | | ATTY. ANNA GRACE I. MARPL BAC Chairman |
| er your reques | | f the above-mentioned article(s)/work(s) on the unit pri nform with the terms and conditions of this requiremer | |
| | Date Submitted | Signature over printed name of the Authorized Com Designation: | |

Email:





TERMS OF REFERENCE

Procurement of the Services of a Marketing Research/Survey Company to Administer, Generate, and Interpret Results* of the Customer Satisfaction Survey for 2022 CITEM's Signature Events

I. BACKGROUND

The Center for International Trade Expositions and Missions (CITEM), the export promotions arm of the Department of Trade and Industry (DTI), is a government-owned or controlled corporation (GOCC) committed to developing, nurturing, and promoting globally competitive small and medium enterprises (SMEs), exporters, designers, and manufacturers by implementing an Integrated Approach to Export Marketing in partnership with other government and private entities.1

CITEM has established the country's image as the premier destination for quality export products and services. It has set the highest standards of creativity, excellence, and innovation for Philippine exportready products and services for over three decades now. CITEM-organized and -managed physical trade fairs are renowned for innovative concepts and design. Exhibitors (participating companies) and Trade Buyers (attendees of the trade fairs, which include local or foreign buyers representing different procurement channels) are CITEM's major stakeholders.

To date, the ongoing public health emergency due to COVID-19, which became widespread in the Philippines in 2020, may have limited the organization and staging of physical trade fairs. Nevertheless, CITEM's commitment to its mandate remains and is evidenced by staging digital trade fair versions of its physical locally held signature events.

As GOCC under the jurisdiction of the Governance Commission for the Government-Owned and Controlled Corporation (GCG), CITEM's organizational performance -- particularly on how it provides its services to its stakeholders - is measured by the level of satisfaction of its stakeholders via a customer satisfaction survey (CSS). In the case of CITEM's digital and hybrid² trade fairs, CSS is conducted after participating in the online exhibition or the online component of the hybrid trade fair. For physical/in-person trade fairs, it is deployed usually a day after the trade fair begins to provide sufficient time for Trade Buyers to appraise the event better vis-à-vis their business and other objectives.

The CSS is deployed to measure the effectiveness and relevance of CITEM's performance against its strategic objective of improving stakeholder satisfaction and is reported as part of the Balanced Scorecard metrics in its Performance Evaluation System³ for 2022 as agreed with the GCG.

The services of the marketing research/survey company that will be procured in line with this TOR are required to follow the "Enhanced Standard Guideline on the Conduct of Customer Satisfaction Survey4" issued by GCG on 26 September 2019, the "Additional Guidelines in the Conduct of the Customer Satisfaction Survey⁵" on 14 August 2020; and the GCG letter to CITEM indicating the "Clarification on the Conduct of the 2021 Customer Satisfaction Survey of the CITEM" on 16 April 2021.

II. OBJECTIVES of the CSS

- A. Generate feedback from CITEM's stakeholders
- B. Enable CITEM to assess its performance in the delivery of its services based on the GCG and the Agency-identified satisfaction metrics and variables
- C. Identify specific actions and opportunities for improvement in the delivery of its services
- D. Comply with the good governance conditions of the GCG









III. SCOPE OF SERVICES OF A MARKETING RESEARCH/SURVEY COMPANY

A. The Marketing Research/Survey Company that will be engaged is required to:

| CITEM Signature Event | Scope of services | Expected output |
|--|---|---|
| 1. Sustainability Solutions Exchange (SSX) Venue: Digital Dates: 23-25 March 2022 | Interpret the results generated from 21-day online survey period Prepare a project report that includes the following: - thorough statistical and data trends analysis - Data Quality Collection report - findings on the quality of assistance, support, and service as perceived by CITEM stakeholders - gaps in the delivery of service assistance, support, and services - proposal on improvements or recommendations in the delivery of services and support | Present and discuss the CSS results to the Corporate Planning Division Prepare an SSX CSS project report |
| 2. Creative Futures (CREATEPhilippines) Venue: Digital Dates: 28-29 July 2022 3. FAME+ Market Days (Manila FAME) Venue: Digital Dates: 19-21 October 2022 | Administer the online CSS forms to the following attendees during event dates and until the 21-day survey period Conference Attendees of Creative Futures Exhibitors and Trade Buyers of FAME+ Market Days Generate and interpret the CSS results of each digital trade fair Prepare a project report for each digital signature event that includes the following: thorough statistical and data trends analysis Data Quality Collection Report findings on the quality of assistance, support, and service as perceived by CITEM stakeholders gaps in the delivery of service assistance, support, and services proposal on improvements or recommendations in the delivery of services and support | Present and discuss the CSS results generated from each signature event to the Corporate Planning Division Prepare a CSS project report for each signature event |
| 4. IFEX Philippines Venue: WTCMM Dates: 22-24 September 2022 | Conduct an onsite intercept interview/survey of exhibitors and trade buyers during IFEX Philippines event Generate and interpret the CSS results Prepare a project report that includes the following: thorough statistical and data trends analysis Data Quality Collection report findings on the quality of assistance, support, and service as perceived by CITEM stakeholders gaps in the delivery of service assistance, support, and services proposal on improvements or recommendations in the delivery of services and support | Present and discuss the CSS results to the Corporate Planning Division Prepare a CSS project report |

| CITEM Signature Event | Scope of services | Expected output |
|--------------------------|---|--|
| | Prepare an EXECUTIVE SUMMARY of all 2022 CSS Reports on each CITEM Signature Events that incorporates the following: Analysis Plan Data Collection Quality Control Report Full findings from the statistical analysis of survey results, insights, conclusions, and actionable recommendations to address the survey findings Tabulation of statistical data and survey results Sample of accomplished online survey forms (five (5) sample accomplished online forms each from Exhibitors and from Trade Buyers) and a link to the drive which includes all documentation on the above. Turnover of all the CSS results tally generated from the online survey platform and all hardcopies of the CSS forms.* *In line with the GCG Guideline on the Conduct of the Customer Satisfaction Survey: The custodian of the CSS respondents' data is CITEM, and the upholding of the data privacy of CITEM's CSS respondents is CITEM. | 2022 Executive Summary on 2022 CITEM Signature Events |

B. Data Collection Guidelines

All data to be collected must strictly abide by the indicated guidelines on Data Collection as indicated in **Section IV of the Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey**⁶ and the **Additional Guidelines in the Conduct of the Customer Satisfaction Survey (CSS) for 2020 in the GOCC Sector**⁷. The questions must be strictly guided by the GCG-prescribed Survey Questionnaires and CITEM's additional service-specific questions unless changed with the approval of the GCG.

C. Data Survey Instrument

The GCG-prescribed CSS instrument for CITEM's Exhibitors and Trade Buyers, translated in a digitalized version, shall be used for SSX, CREATE Philippines, and FAME+ Market Days signature events. Printed versions of the GCG-prescribed CSS shall be deployed onsite during IFEXConnect event.

IV. QUALIFICATIONS OF THE MARKETING RESEARCH/SURVEY COMPANY

The marketing research/survey company to be engaged for this requirement should possess the following qualifications:

| PARTICULARS | PERCENTAGE | RATING |
|---|------------|--------|
| A. Applicable Experience of the Research/Survey Company With more than three (3) years of industry experience in conducting stakeholder satisfaction surveys and related research, from formulating the methodology to analysis and report presentation that will be referenced from a portfolio ⁸ of ongoing and completed government and private contracts and | 30% | |
| certifications in this regard. With more than three (3) years of experience (30%) | _ | |
| With three (3) years of experience (20%) | | |
| With less than three (3) years of experience (10%) | | |
| With no indicated years of experience (0%) | | |

| PARTICULARS | PERCENTAGE | RATING |
|---|------------|--------|
| B. Successful implementation of similar projects* within the last three (3) years (minimum of 3 customers/stakeholder satisfaction survey-related projects *Based on submitted Certificates of Project Completion showing satisfactory delivery of service. • At least three (3) customer/stakeholder satisfaction survey-related projects, with at least one government client (20%) • At least three (3) customer/stakeholder satisfaction survey-related projects, but no government client (15%) • Less than three (3) customer/stakeholder satisfaction survey-related projects (10%) • No customer/stakeholder satisfaction survey-related projects (0%) | 20% | |
| C. Member of good standing* in any internationally recognized association of marketing research agencies/survey companies. *Proof of membership or certificate of good standing in relevant societies is required to substantiate affiliation. • With membership in any internationally recognized association of marketing research agencies (5%) • No membership in any internationally recognized association of marketing research agencies (0%) | 5% | |
| D. Composition of key personnel as stated in the GCG guideline: Overall Project Manager Assistant Project Managers (Asst. Project Manager & Statistician) Overall Field Manager Overall Data Processing Manager Data Processing Supervisor/Digital Operations Supervisor or Encoding Supervisor Complete composition of the CSS team as prescribed by GCG (10%) Incomplete composition of CSS Team (0%) | 10% | |
| D. Qualification of personnel* assigned to the Project *Based on submitted CVs identifying the personnel to be assigned in the Project *It is preferred that all key personnel/project team members have work experience in conducting surveys or qualitative and quantitative research in customer/stakeholder satisfaction. • All key personnel have more than three (3) years of relevant work experience in conducting CSS (20%) • All key personnel have at least three (3) years of relevant work experience in conducting CSS (15%) • All key personnel have less than three (3) years of relevant work experience in conducting CSS (10%) • All key personnel have no relevant work experience in conducting CSS (0%) | 20% | |

| PARTICULARS | PERCENTAGE | RATING |
|---|------------|--------|
| E. A member/s of the Project Team has demonstrated specialization* in database creation, data filing, and statistical analyses of large data sets. | | |
| * As evidenced by work experience/portfolio, certification, or a combination thereof, as in indicated in the CV of personnel concerned | 10% | |
| High proficiency in data processing and use of data analysis software such as SPSS, SAS (10%) | | |
| No proficiency in data processing and use of data analysis software such as SPSS (0%) | | |
| F. With publication in research journals or other media that demonstrate excellent communication skills and statistical survey report writing (by any member of the Project Team) | | |
| *As evidenced by work experience/portfolio, as indicated in the CV of personnel concerned | 5% | |
| With published research-related articles that demonstrate above criteria (5%) | | |
| No published research-related articles (0%) | | |
| Total | 100% | |

The marketing research/survey company that attains at least 80% and which has presented the Lowest Calculated Bid (LCB) will be considered for this requirement.

V. DURATION OF WORK

The engagement of services of the Marketing Research/Survey Company that will administer, generate, and interpret results of the customer satisfaction survey for 2022 CITEM Signature Events shall be undertaken after the signing of the Job Order/Contract up until the submission and satisfactory acceptance of the Executive Summary report by CITEM.

The indicative timeframe and list of Projected Activities, which may be modified as mutually agreed and formalized by both parties of this requirement, are as follows:

| SIGNATURE EVENTS | PROJECTED ACTIVITIES |
|--|---|
| SUSTAINABILITY SOLUTIONS EXCHANGE (Date: 23-25 March 2022) | The projected activities for and during each signature event is as follows: |
| CREATE Philippines (Date: 28-29 July 2022) | Briefing with Marketing Research/Survey Company about CITEM signature events and tokens for CSS respondents |
| IFEX Philippines (Date: 22-24 September 2022) | Conduct of online and on-site* CSS Presentation and discussion of CSS findings to the End-user |
| FAME+ Market Days (Date: 19-21 October 2022) | Submission of a CSS Report/signature event Submit a General Executive Summary of the 2022 CSS Report *in the case of IFEX Philippines |

VI. MODE OF PROCUREMENT

The mode of procurement for this requirement shall be through Alternative Mode-Small Value Procurement (SVP).

VI. INDICATIVE TERMS OF PAYMENT

| Service Milestone | Percentage of |
|--|------------------|
| | Payment* |
| Briefing about CITEM's 2022 Work Program Briefing about Sustainability Solutions Exchange (SSX) event CITEM's acceptance and approval of CSS report (Word and .pptx) | |
| Briefing about CREATE Philippines event Conduct and completion of CSS CITEM's acceptance and approval of CSS report for CREATE Philippines (Word and .pptx) | 40% |
| Briefing about IFEX Philippines event Conduct and completion of onsite CSS CITEM's acceptance and approval of CSS report for IFEX Philippines (Word and .pptx) | |
| Briefing about FAME+ Market Days Conduct and completion of CSS CITEM's acceptance and approval of CSS report for FAME+ Market Days (Word and .pptx) CITEM's acceptance and approval of the Executive Summary Report 30 working days after the 4th signature event | 60% |
| Total | 100% |

Note:

*Estimate based on effort that will be used in processing the expected number of sample respondents for each signature event. See computation in Annex A⁹. The Processing of payment will begin upon acceptance and approval of required outputs, receipt of invoice per tranche, and complete supporting documents in accordance with applicable government rules and regulations.

VIII. APPROVED BUDGET FOR THE CONTRACT (ABC):

The approved budget for the Procurement of the "Services of a Marketing Research/Survey Company to Administer, Generate, and Interpret Results of the Customer Satisfaction Survey for 2022 CITEM's Signature Events" is THREE HUNDRED TWENTY-FIVE THOUSAND PESOS (P325,000.00) ONLY inclusive of value-added tax (VAT) and other applicable taxes and fees.

Noted by:

C/TIDS ROMINA AUREA MAGNO
OIC - Corporate Planning Division

Recommending approval

MA. LOURDES D. MEDIRAN
Deputy Executive Director

Approved by:

PAULINA A. SUACO-JUAN Executive Director

⁹ ANNEX A **EXPECTED NUMBER OF SAMPLE RESPONDENTS** per 2022 CITEM Signature Events

Sample size =
$$\frac{\frac{z^2 \times p (1-p)}{e^2}}{1 + (\frac{z^2 \times p (1-p)}{e^2 N})}$$

The number of sample respondents per 2022 CITEM signature event, computed using the above GCG-prescribed formula, is as follows:

| CSS FY2022 | | | | | | |
|-------------|------------------------------------|--------------------------------|-----------------------------------|---------------|---|--------------------------------|
| | Population (N) of | Population (N) of Trade | Population (N) of | Total | Sample (n) for Exhibitors | Sample (n) for Trade Buyers |
| Event Name | Exhibitors (External Target) | Buyers (External Target) | Exhibitors and Trade Buyers | Sample (n) | Proportionate eq for Exhibitors and based on sample | d Trade Buyers |
| SSX | 96 | 202 | 297 | 168 | 54 | 114 |
| CREATEPh | 29 | - | 29 | 28 | 28 | - |
| IFEXConnect | 191 | 438 | 629 | 239 | 73 | 166 |
| FAME+ | 287 | 835 | 1,122 | 287 | 73 | 214 |

¹ About CITEM, https://citem.gov.ph/ accessed 27 January 2022

² A combination of "a live face to face event with a virtual online component. It is an option that is available to bring online participants with face-to-face attendees…it is the new wave of trade shows." The Ultimate Hybrid Trade Show, https://aladdinb2b.com/accessed 28 February 2022

³ GCG Memorandum Circular No. 2013-02 Frequently Asked Questions (FAQs) on GCG PES, https://gcg.gov.ph/files/QDTzkx2w5CuUfzP6cw2P.pdf accessed 28 February 2022

⁴ Guidebook for GOCCs: Enhanced Guidelines on the Conduct of the Customer Satisfaction Survey (CSS), https://gcg.gov.ph/files/0Pcv1VVgGf08JtLrlmlE.pdf accessed on 27 January 2022

⁵ Additional Guidelines in the Conduct of the Customer Satisfaction Survey (CSS) for 2020 in the GOCC Sector, https://gcg.gov.ph/files/b4S4m5zBH1jOzDapF6pE.pdf accessed on 27 January 2022

⁶ Ibid.

⁷ Ibid.

⁸ The portfolio needs to be substantiated by a link to or screen capture of ongoing/completed relevant projects (aligned to marketing research/surveys). Available certification of completed projects are also considered.