

TERMS OF REFERENCE
CREATIVE AGENCY
Sustainable Tourism Campaign

I. Project Description

The creation and launching of a brand to aid in promoting sustainable tourism in the Philippines using a comprehensive research study as basis.

II. Background

In April 26, 2018, Boracay island was closed to the public to undergo a rehabilitation period of 6 months. The island, known for its majestic short, pristine waters and powdery white sand, was found out to have numerous environmental violations caused by overcapacity, illegally-placed structures and ill-managed sewer systems. President Duterte has called it a 'cesspool' and made its rehabilitation a priority in his cabinet.

With the dry run launched on October 15, 2016 and its soft opening slated on October 26, 2018, 6 months after its closure, the world got a glimpse of what has changed in such a short time. The water was clearer, the beach area was cleaner and overall, it was a 'Better Boracay' than before. The island is now dubbed as a model for sustainable tourism in the Philippines.

Sadly, Boracay is not the only island in need of rehabilitation. Other tourist destinations across the country have also had their share of environmental concerns. But with Boracay as an example, local governments are doing their best in fixing and regulating their own tourist destinations as quickly as possible. Ultimately, the tourist also plays a vital role in ensuring that the natural beauty of the country's destinations are preserved. That is why it is important that the tourist is aware of and practices responsible tourism.

III. Objectives

- To conduct a formal research study to determine opportunities where communication and branding can help cultivate a generation of responsible tourists in the Philippines
- To develop a brand that will promote a culture of sustainable tourism among local and foreign tourists in the Philippines
- To produce multimedia materials to support the brand's overall impact to the target audience

IV. Scope of Work, Deliverables and Budget Allocation

1. The Approved Budget of Contract (ABC) for the project is Sixty Million Philippine Pesos (Php 60,000,000.00) inclusive of all applicable taxes, commissions, bank charges, and other fees as may be incurred in the process.

2. The budget is broken down in the matrix below. This is inclusive of all edit-downs/resizing, printing fees, costs for photography and/or stock photos, computer graphics, talent and soundtrack fees, translation to different languages, and all agency service fees in no case shall exceed 12% of the production fees.

3. The breakdown of the media and production budgets, including the number of the advertising materials, may be modified upon recommendation of the winning agency, subject to the written approval of the DOT, to achieve the objectives of the campaign and have optimal media exposure for the same.

Scope of Work	Deliverables
<p>Conduct a formal research study for a duration of one (1) month to gather insights on the habits of local and foreign tourists in the Philippines when visiting a tourist attraction.</p> <p>The agency will select ten (10) tourist destinations (except Boracay), broken down to the following types:</p> <ul style="list-style-type: none"> • 4 Sun and Beach • 2 Nature-Based • 2 Cultural • 2 Diving and Marine Sports 	<p>A formal report on the findings of the research study to serve as the basis of determine effective an branding strategy to promote sustainable tourism</p>
<p>At least 100 people must be interviewed in each destination; broken down into the following profiles:</p> <ul style="list-style-type: none"> • Local Tourists • Foreign Tourists • Local Vendors (if applicable) • Workers (Tour guides, business owners, hotel/resort employees, etc.) • Nearby Residents 	<p>A comprehensive branding strategy that will make the Philippines a top-of-mind in fostering a culture of sustainable tourism</p>
<p>Local Tourists and Nearby Residents will be further profiled by income segment.</p> <p>Foreign Tourists will be further profiled based on income status and country of origin.</p>	<p>Development of a brand name, logo and key visuals for the country’s initiative in sustainable tourism</p>
<p>The agency must set the parameters on what it means to practice sustainable tourism for each profile. The interview will center around finding out whether the respondents currently practice sustainable tourism or not.</p>	<p>The result must still be in-line with the brand equity of “It’s More Fun in the Philippines”.</p>
<p>The agency must analyze through their methodology as to why or why don’t the respondents practice responsible tourism. Lastly, the study must evaluate the current communication efforts for and within the tourist</p>	<p>Recommend and design effective eco-friendly OOH materials based on the findings of the research study</p>
<p>The agency must analyze through their methodology as to why or why don’t the respondents practice responsible tourism. Lastly, the study must evaluate the current communication efforts for and within the tourist</p>	<p>Conceptualization and production of additional materials and respective communication strategies, as may be necessary, subject to additional funds</p>

<p>destinations to see if they are effective in doing so, based on the insights gathered from their respondents.</p> <p>All of these will result to the agency's point of reference in formulating the core message and creative design in producing the necessary communications tools.</p>	<p>and a separate agreement with the DOT.</p>
<p>Production of Philippine tourism brand book</p>	<p>(1) Digital version of the brand book (1) Ready to print version of the brand book</p> <p>Details: Proposal of the brand book specs will be provided by the agency and approved by DOT.</p>
<p>Production and implementation of a TVC-ready omnibus audiovisual presentation for the sustainable tourism brand</p>	<p>(3) AVPs on the omnibus material</p> <p><i>Details:</i> (1) 3-minute AVP (1) 1-minute AVP (1) 30-second AVP</p> <p>All AVPs are expected to have a maximum of 5 translations and subtitle files as required by the DOT and must be open to edits as required by the media censorship boards where the AVPs are to be used.</p> <p><i>Optional:</i> (1) 30-second radio advertisement if material is appropriate</p>
<p>Regular updating on the cost estimates on the production of creative materials</p>	
<p>Production and implementation of an audiovisual presentation for the digital medium to guide and educate local tourists on how to be responsible tourists</p>	<p>(3) AVPs on the omnibus material</p> <p><i>Details:</i> (1) 5-minute AVP (1) 2:30-minute AVP (1) 45-second AVP</p>

	<p>-----</p> <p>The AVP will either be in English or in Filipino depending on the recommendation of the agency.</p> <p>A maximum of 5 translations and subtitle files as required by the DOT and must be open to edits as required by the media censorship boards where the AVPs are to be used.</p> <p><i>Optional:</i> (1) 30-second radio advertisement if material is appropriate</p>
<p>Towards the completion of the engagement, assess the outcome of the campaign and aid the DOT in the crafting of the succeeding campaign incorporating the insights and recommendations from the evaluation of creative materials made during the period of engagement.</p>	<p>Provide at no cost to the DOT upon the completion of the contract, a full-day workshop with a marketing consultant to be nominated by the chosen creative agency with select DOT employees. The objective of which is to initiate the development and set guidelines of subsequent branding campaigns based on recent data, new learnings, and best practices. The expected output of this workshop may be used as the basis for the next branding TOR.</p>

V. Milestones

1. The survey must be executed in, at most, (1) month after the signing of the contract.
2. Final artwork of brand design and key visuals and is due on February 28, 2019 and the launch of AVPs will be on 1st Week April 2019
3. The proposed payment scheme for the campaign will be billed progressively upon completion of the following milestones:

Milestones	Payment %
Upon approval of campaign concept and timelines	20%
Upon approval of all storyboards for AVPs	20%
Upon completed production of all creative materials	50%
Upon acceptance of the Terminal Report	10%
Total	100%

VI. Qualifications:

Stage 1- Submission of eligibility documents

Stage 2- For short-listed bidders, show a brief credentials presentation and a proposed communications strategy to promote sustainable tourism in the country

Note: Agencies who do not pass Stage 1 will not be proceed to Stage 2, which is the creative presentation.

Qualification	Requirements
<p>The agency to be selected must be full-service creative agency, with resources for insight gathering, strategic thinking, advertising and digital advertising (from creative conceptualization to final art production), and activation or public relations.</p> <p>The agencies must be duly established in the Philippines, and may have a tie-up or joint venture arrangement with other local agencies to execute production of advertising materials. It may also have a joint venture with a global media agency for the strategic planning and conceptualization of a media strategy and its appropriate implementation through media placements.</p>	<ul style="list-style-type: none"> ✓ Company profile with list of services offered. ✓ List of previous joint venture arrangement with other suppliers (i.e., production houses, research agencies, PR agencies, media agencies, etc.)
<p>The agency must be capable of advising the client on how to focus the communication, how to appeal the specific target audiences, what information or messages to highlight and how to make these attractive and effective, how to optimize budget, and what advertising combinations would be most persuasive, and other inputs hinged on local market insights.</p>	<ul style="list-style-type: none"> ✓ Credentials presentation reflecting the roster of clients, including one (1) short case study of successful advocacy campaign done in the past 5 years, if any

Won at least one international award, or a local award given by any award-giving body in existence for at least 5 years.	<ul style="list-style-type: none"> ✓ List of awards/citations received by the agency; please include awards for an advocacy campaign if any
The agencies must have been existing for at least (5) years, and must have undertaken an nationwide campaign during the last three (3) years, with a total ABC of at least Thirty Million Pesos (30,000,000.00)	<ul style="list-style-type: none"> ✓ Documentation that certifies terms of existence ✓ Documentation that certifies having undertaken an international campaign not more than 3 years ago

VII. Minimum Required Personnel

Required Personnel	Minimum Years of Experience in Handling Nationwide Accounts
1. Account Manager 1	5 years
2. Account Manager 2	5 years
3. Marketing Research Associate	5 years
4. Strategic Planner	5 years
5. Account Director	5 years
6. Art Director	5 years
7. Copy Writer	5 years
8. FA Artist	5 years
9. Managing Supervisor	5 years
10. Creative Director	5 years

Note: Bidders may recommend additional personnel deemed fit for the Team

VIII. Campaign Presentation

1. Short listed bidders who will be declared compliant with the technical requirements on the opening of bids will be required to present their proposed campaign to the members of the Bids and Awards Committee (BAC), DOT executives and other tourism stakeholders that the DOT will invite during the pitch presentation.
2. A maximum of forty-five minutes (45 minutes) will be given for each agency for its presentation excluding the question and answer portion with BAC Members and such other individuals to be invited by the DOT.
3. Creative materials include, but are not limited to, the research brief and methodology, the communications strategy, a working title for the brand name and logo design/key visuals, and a sample storyboard for one (1) of the AVPs.
4. Proposal on agency service fees, which will be commission-based. This proposal shall reflect a total commission on production which shall be maximum of twelve percent (12%) of the total production fees;

5. The presentation will be rated by BAC members individually, and ratings will be averaged to arrive at a final score per agency. Rating will be done based on the scores.

IX. Criteria for Rating

A. Eligibility Check and Shortlisting Criteria and Rating (80% passing score)

I	APPLICABLE EXPERIENCE OF THE CONSULTANT	60%
A.	<i>Appropriateness of the agency for the assignment</i>	<i>20</i>
	Full service creative agency	20
	Production House, PR Agency or Consulting Agency only	10
	Others	5
B.	<i>Extent of network of the agency</i>	<i>10</i>
	National	10
	Regional	4
C.	<i>Number of Similar Projects Completed in the last 3 years</i>	<i>10</i>
	At least one nationwide campaign	10
	At least one regional campaign	4
	No campaign	0
D.	<i>Years in Existence</i>	<i>10</i>
	5 years & above	10
	Below 5 years	0
E.	<i>Projects handled in last 3 years</i>	<i>10</i>
	At least one project with contract cost equal or greater than 30M	10
	At least one project with contract cost less than 30M	0
II	QUALIFICATION OF PERSONNEL WHO MAY BE ASSIGNED TO THE JOB	20%
A.	<i>Years of Experience in Similar Projects</i>	<i>20</i>
	5 years and above	20
	3-4 years	10
	below 3 years	0
IV	CURRENT WORKLOAD RELATIVE TO CAPACITY (20)	20%
	Number of on-going similar and related projects relative to capacity	20
	3 or more projects with contract cost equal or greater than 30M	5
	2 projects with contract cost equal or greater than 30M	10
	1 project with contract cost equal or greater than 30M	15
	no project with contract cost equal or greater than 30M	20
TOTAL		100%

B. Technical Bid/Proposal Criteria and Rating (70% passing score)

CRITERIA		RATING
A.	Quality of Personnel to be assigned to the project	20%
I.	Minimum Required Personnel	10%
II.	Minimum of 5 years working experience in handling nationwide accounts	10%
B.	Expertise and Capability of the Consultant	30%
I.	Full-Service Capabilities	
	Research or Insight Gathering	2%
	Creative Conceptualization	2%
	Strategic Marketing	2%
	Public Relations	2%
	At least one (1) completed project via Joint Venture Agreement	2%
II.	Experience and Credentials	
	At least one (1) successful campaign the agency has launched within 5 years	5%
	At least one (1) international or local award by an award-giving body in existence for at least 5 years	5%
	Must have been existing for at least 5 years	5%
	Must have undertaken an international/national campaign within 3 years	5%
C.	Plan of Approach and Methodology	50%
I.	Research	
	Research brief is comprehensive and relevant to the project	5%
	Feasibility	5%
II.	Creative Rendition	
	Effectiveness of branding strategy and messaging	10%
	Originality of AVP storyboard	10%
	Visual Impact of branding and key visuals	5%
	Appropriateness of OOH strategy	5%
III.	Over-all Impact	10%

TOTAL	100%
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X. Other Terms and Conditions

1. The Approved Budget of Contract (ABC) for the project is Sixty Million Philippine Pesos (Php 60,000,000.00) inclusive of all applicable taxes, commissions, bank charges, and other fees as may be incurred in the process.
2. The DOT reserves the right to adjust budget allocation for the project, as it may deem necessary and proper, to achieve optimal exposure.
3. All advertising and creative concepts and original materials (raw and edited) formulated and designed in conjunction with this campaign shall be owned by DOT, with full and exclusive rights, relative to the future use thereof both in the Philippines and internationally. This should be submitted to the DOT in a sturdy hard drive/s;
4. Material/s produced by the winning bidder should be original and aligned with the DOT's advocacies such as Gender and Development and barrier-free tourism;
5. All and each of the materials produced during the period of engagement shall be amenable to edits at no cost to the DOT for a maximum of 5 revisions in a span of 5 years, whichever comes first.

Segments of this campaign not implemented for whatever reason shall be revised or modified by the winning agency and no cost on the part of the DOT and for the purpose of modifying said segment(s) for future implementation.

6. Winning agency shall be subject to the assessment by the DOT according to the effectiveness of delivery of any part or phase of the campaign. The DOT reserves the right to terminate the services of the winning agency should any part of the deliverables be unsatisfactory.
7. Should the DOT find cause to rescind or terminate the campaign, the DOT may negotiate the contract starting with the second lowest calculated/highest rated bidder for the project, in consideration of the bidder's original bid price. If the negotiation fails, then negotiation shall be done with the third lowest calculated/highest rated bidder at its original price. If the negotiation fails again and in cases where there are no other bidders, a shortlist of at least (3) eligible agencies shall be invited to submit their bids, and negotiation shall be made starting with the lowest calculated/highest rated bidder.
8. Any difference between the budgets indicated and the actual cost incurred for the campaign may be applied to payment for the performance by the winning agency of services for such works and/or adjustments within the scope of this phase of the campaign, which the DOT may require the winning agency to perform during the implementation of a sub-campaign, at the election of DOT.

9. The compensation to be paid for the services of the selected creative agency on production cost shall be pegged at the maximum amount of 12% of the production and execution cost of the campaign, which amount shall be reflected on the final cost estimate for the production and/or execution of any segment of the campaign (e.g., production cost of TVCs, print ads, cost to execute activation and the like).The amount of the compensation to the selected agency shall be all-inclusive for its services.