

TERMS OF REFERENCE
CONSULTING AGENCY FOR THE SUSTAINABLE TOURISM CAMPAIGN
DEPARTMENT OF TOURISM
BRANDING AND MARKETING COMMUNICATIONS

I. Overview and Background

The Department of Tourism (DOT) is looking for a Full-Service Creative Agency, Public Relations Agency, or Production House that will strategize, conceptualize, and execute DOT's Sustainable Tourism campaign.

Save Our Spots (SOS), DOT's Sustainable Tourism campaign launched in 2019, aimed to educate travelers about becoming responsible tourists. The result of the study conducted for the campaign showed that the majority of Filipinos lacked the basic knowledge of what sustainable tourism is, its importance, and why they are responsible for its success.

SOS content was created and published on DOT's digital platforms. The material specified the essential components of sustainable tourism and aimed to inspire people to fulfill their role as responsible tourists. To build on the momentum the campaign has created, we continue with the SOS campaign and prioritize its primary objective- educating local tourists about their sustainable tourism role. This includes highlighting protected areas in the country by supporting the Department of Environment's Year of Protected Areas (YOPA) campaign.

For the second phase of the campaign, DOT will work with stakeholders- enterprises, communities, organizations, businesses, or even local governments that practice sustainable tourism.

Sustainable Tourism criteria will be based on the ASEAN Tourism Standards that include the following: (a) Environmental Policy and Actions for Hotel Operations, (b) Use of Green Products, (c) Collaboration with Community and Local Organizations, (d) Human Resource Development, (e) Solid Waste Management and (f) Energy Efficiency. Previous ASEAN awardees include Bohol, Davao, and Palawan resorts and destinations, including Baguio City, Iloilo City, and San Carlos City.

Through the second phase of the campaign, we highlight and reward stakeholders in their sustainability efforts. The reward comes in the form of DOT-initiated marketing and promotions. In turn, they will be DOT's luminaries in the sustainable tourism campaign and serve as an example to the public and other stakeholders. Effectively, DOT gives stakeholders ownership and inspires others to emulate their achievement while providing the public concrete examples of sustainable tourism practices and the impact tourists have on creating a better, more equitable tourism industry.

II. Objectives

1. Communicate the sustainable tourism efforts of the Philippines to create a favorable image of the country as a model of sustainability in Asia and across the globe.
2. Create awareness for the protected areas in the country to inspire their local communities and visitors to support the areas' preservation.
3. Educate the public on sustainable tourism principles and how to become responsible tourists.

III. Scope and Deliverables

SCOPE OF WORK	DELIVERABLES
<p>PHASE 1: An Integrated Marketing Campaign for Sustainable Tourism</p> <p>The Agency will create and execute a strategic creative marketing campaign that will support DOT's objective in educating the Filipino public about sustainable tourism while also getting stakeholders involved in the campaign.</p> <p>The marketing plan should be able to put a spotlight on exemplary enterprises, organizations, or even LGUs that have prioritized sustainable tourism. The goal is to incentivize stakeholder participation through marketing and promotions efforts extend by DOT.</p> <p>The objectives of the campaign will be the following:</p> <ol style="list-style-type: none"> 1. Market and promote the existing DOT Sustainable Tourism award program featuring exemplary stakeholders 2. Educate the public about sustainable tourism and its components 3. Encourage the public to support stakeholders that practice sustainable tourism 4. Inspire the public to participate in sustainable tourism efforts and become responsible tourists 5. Celebrate women, children, and other marginalized tourism stakeholders and their role in creating a sustainable tourism industry 	<ol style="list-style-type: none"> 1. Create an integrated marketing communications (IMC) plan 2. Establish measurable goals and KPIs 3. Identify target audience and personas 4. Identify channels where the content will be published 5. Asset Creation which may include but is not limited to: AVPs Documentary videos Write-ups Podcasts 6. Launch of the campaign and event activation 7. Social media promotions 8. Creation of microsite content within Philippines.travel to collate all materials of the campaign 9. Event launch 10. Publicity plan 11. Terminal Report <p>The Agency will be responsible and cover all costs in executing the marketing campaign. The budget includes honorarium fees, cost of logistics, accommodation, food, transportation, permits, location fees, production costs, COVID-19 testing, and more.</p>

<p>Phase 2: Promotions of the Year of Protected Areas (YOPA)</p> <p>The agency will be responsible for creating materials to promote the Year of Protected Areas campaign, a project of DOT and DENR.</p> <p>The campaign will focus on six locations:</p> <ol style="list-style-type: none"> 1. Bongsanglay Natural Park, Masbate 2. Balinsasayo Twin Lakes, Dumaguete 3. Apo Reef, Natural Park, Occidental Mindoro 4. Mt. Hamiguitan, Davao Oriental 5. Samar Island Natural Park 6. Mt. Timpong, Cagayan de Oro <p>The objectives of the campaign will be the following:</p> <ol style="list-style-type: none"> 1. Educate the public about ecotourism and protected areas 2. Establish and influence tourist behavior in protected areas 3. Promote the ecotourism sites 4. Drive tourism traffic and generate tourism revenues for the local economy of the eco sites 5. Support women in the tourism sector 	<ol style="list-style-type: none"> 1. Create a promotion plan for the YOPA campaign 2. Produce no less than seven AVPs focused on the six locations and an omnibus AVP. The AVPs should not be less than 1min videos and have edit-downs for social media content. 3. Create and execute a social media plan to boost the materials and educate the public about YOPA <p>The Agency will be responsible and cover all costs in the creation, execution, and publishing of the assets. This includes honorarium fees, costs of logistics, accommodation, food, transportation, permits, location fees, COVID-19 testing production costs, and more.</p>
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<p>Terminal Report</p> <p>The Agency must submit a digital and printed copy of the terminal report, covering all aspects of the campaign from planning to execution.</p> <p>It must include insights, analysis, recommendations, and evaluations of the campaign, including conceptualization, workflow, asset creation, and execution. The Department will be able to use the terminal report as a basis for its subsequent campaigns. The data must include an analysis of how the campaign has included gender development.</p> <p>All the approved and raw materials, files, data, reports must also be submitted.</p>	<ol style="list-style-type: none"> 1. Create a comprehensive terminal report including insights, analysis, recommendations, data, , and evaluations. 2. Deliver a hard and soft copy of the report 3. Mount a digital or face-to-face workshop with at least 20 attendees from DOT with no less than two resource speakers. The workshop includes a presentation of the terminal report and discussion, evaluation, and recommendation from invited resource persons. The Agency will shoulder all costs, including food, accommodation, transportation, testing, honorarium, and other applicable logistical expenses.
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IV. Project Duration and Budget Allocation

1. The campaign shall be for a period of five (5) months, to commence upon the receipt of Consultant of the Notice to Proceed.
2. The Approved Budget of Contract (ABC) for the project is twenty million (P20,000,000) inclusive of all applicable taxes, agency service fees, bank charges, and other fees as may be incurred in the process.
3. The proposed payment scheme for the campaign will be billed progressively upon completion of the following milestones. In each milestone, the Awarded Agency will be required to submit (1) an accomplishment report; (2) Certification of Acceptance signed by the DOT Project Proponent and Superior.
4. The Agency will submit its cost estimate for each deliverable. When procuring outsource service, the Agency will need to present three quotes from suppliers, one of which is DOT accredited enterprise, if applicable.
5. Other qualifications of the required media agency for this project are stated in the Bid Data Sheet (BDS).

MILESTONES	PAYMENT
Approval of the integrated marketing plan for Sustainable Tourism and YOPA	25%
Submission of the 2 nd and 3 rd month rollout report of the approved Sustainable Tourism Plan and its implementation	15%
Submission of the 4 th and 5 th month rollout report of the approved Sustainable Tourism Plan and its implementation	15%
Submission of rollout report of the approved YOPA plan and its implementation	30%
Submission of a comprehensive report for accomplished marketing campaigns	15%

V. Minimum Required Personnel

Required Personnel	Minimum Years of Experience in Handling Related Campaign/s Required by DOT Under This Project
1. Managing Director (Project Lead)	15 years
2. Creative Director	15 years
3. Account Manager	10 years
4. Digital Marketing Manager	8 years
5. PR Strategist	8 years
6. Social Media Strategist	5 years
7. Lead Researcher	8 years
8. Lead Art Director	8 years
9. Lead Copy Writer	8 years
10. Lead PR Writer	8 years

Note: Bidders may recommend additional personnel deemed fit for the team. Personnel must have had been in his/her position or similar capacity in the required number of years based on their career. Please include in the bid documents the resume of the personnel and the work reference’s contact details.

VI. Criteria for Rating

Stage 1- Submission of eligibility documents

Stage 2- For shortlisted bidders, submit brief credentials and the proposed media plan

1. Shortlisted 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 BAC Committee, the Technical Working Group for Branding Related Projects (TWG), DOT officials and other tourism stakeholders that the DOT will invite during the pitch presentation.
2. A maximum of thirty minutes (30 minutes) will be given to each agency for their presentation to TWG Members and such other individuals to be invited by the DOT. They will also be required to present and introduce the credentials of the team members assigned to the DOT project. Please provide the CV/resume of the team members. The allotted time excludes the question-and-answer portion.
3. The presentation will be rated TWG members individually, and ratings will be averaged to arrive at a final score per agency. Rating will be done based on the scores.

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

I.	APPLICABLE EXPERIENCE OF THE CONSULTANT	60%
	<i>Appropriateness of the agency for the assignment</i>	15%
	Full-service Creative Agency	15%
	Public Relations Firm/Agency	10%
	Production House with PR services	5%
	<i>Reach of the agency</i>	15%
	Nationwide reach	15%
	Regional reach	10%
	<i>Similar Projects Completed in the last 3 years</i>	10%
	At least 4 completed marketing, advertising, or publicity campaigns	10%

	1-3 completed marketing, advertising, or publicity campaigns	5%
	<i>Years in Existence as Creative Agency, Public Relations Agency, Production House</i>	10%
	8 years and above	10%
	Below 5-7 years	5%
	<i>Contract cost of Completed Projects in the last 3 years</i>	10%
	At least three projects with contract cost equal or greater than Php 10M each	10%
	One or two projects with contract cost equal or greater than Php 10M each	5%
	No projects with contract cost equal or greater than Php 10M each	0%
II.	QUALIFICATION OF PERSONNEL WHO MAY BE ASSIGNED TO THE JOB (refer to IV. Minimum Required Personnel)	20%
	Required number and positions of personnel with minimum years of experience is exceeded by an additional 5 personnel following any of the profiles of the identified minimum required personnel with respective minimum years of experience	20%
	Required number and positions of personnel with minimum years of experience is met	15%
III.	CURRENT WORKLOAD RELATIVE TO CAPACITY Number of ongoing similar and related projects relative to capacity	20%
	No projects with contract cost equal or greater than Php 10M each	5%
	4 or more projects with contract cost equal or greater than Php 10M each	10%
	1-3 projects with contract cost equal or greater than Php 10M each	20%

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

A.	Quality of Personnel to be assigned to the project	20%
	All minimum required personnel have been involved in at least one project for (1) a client's Corporate Social Responsibility (CSR) unit, (2) a non-profit organization on the environment, livelihoods, or sustainability, or (3) the tourism industry.	20%
	At least five of the minimum required personnel has been involved in at least one project for (1) a client's Corporate Social Responsibility (CSR) unit, (2) a non-profit organization on the environment, livelihoods, or sustainability, or (3) the tourism industry.	15%
	One to four of the minimum required personnel has been involved in at least one project for (1) a client's Corporate Social Responsibility (CSR) unit, (2) a non-profit organization on the environment, livelihoods, or sustainability, or (3) the tourism industry.	10%
	Only one personnel have been involved in at least one project for (1) a client's Corporate Social Responsibility (CSR) unit, (2) a non-profit organization on the environment, livelihoods, or sustainability, or (3) the tourism industry.	5%
B.	Expertise and Capability of the Firm	30%
	Services rendered in completed projects in the past 3 years	
	Marketing/advertising campaigns	10%
	Public Relations	7%
	Digital Campaigns	3%
	Experience and Credentials	
	At least three (3) completed campaigns related to Marketing/Advertising, Public Relations or Digital Campaigns, validated or certified by previous clients, the agency has launched within 3 years	5%
	At least one (1) international (outside Philippines) or national award related to Marketing/Advertising, Public Relations or Digital Campaigns, in the last 3 years by an award-giving body in existence for at least 10 years	5%

C.	Plan of Approach and Methodology	50%
	Resonance of the overall messaging and theme of the IMC Plan proposal to achieve the project's objectives	20%
	The appropriateness of the proposed media partners and entities for national and regional promotion of DOT programs and projects	10%
	Originality and feasibility of Marketing and PR tactics to accomplish the project's objective	10%
	Quality of other strategies outside of the scope of work than can further the goals of this project without additional cost to the proposed budget	10%
TOTAL		100%

VII. Terms and Conditions

1. Segment(s) or phase(s) of the campaign not implemented for whatever reason shall be revised modified by the Agency at no cost on the part of DOT to translate said segment(s) or phase(s) for future implementation.
2. All publicity, 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. The materials should be submitted to the DOT in a sturdy hard drive/s;
3. The selected Agency shall be subject to the assessment of the DOT as to the effectiveness of any phase of the media campaign launched.
4. The Agency shall submit regular reports detailing work progress, issues, and concerns and recommend next steps concerning the project as part of the deliverables.
5. Any excess remuneration or compensation in the form of a rebate from the international or local network/s shall be negotiated with the DOT in the form of additional marketing materials, publicity materials and/or extended media placements in order to maximize the effect and benefit of the campaign.
6. All AVPs and photos should be submitted as final approved flattened files and editable files (PSD, Adobe Premiere file, etc.).

VIII. Contact Person

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