

## TERMS OF REFERENCE

### SERVICE PROVIDER FOR THE 2020 CUSTOMER SATISFACTION SURVEY

#### **Project Background/Rationale**

Tourism Infrastructure and Enterprise Zone Authority (TIEZA), formerly Philippine Tourism Authority (PTA), was created on May 12, 2009 with the enactment Republic Act No. 9593, *"An Act Declaring a National Policy for Tourism as an Engine of Investment, Employment, Growth and National Development, and Strengthening the Department of Tourism and its Attached Agencies to Effectively and Efficiently Implement that Policy and Appropriating Funds Therefore "* otherwise known as the *"Tourism Act of 2009"*. TIEZA is mandated to designate, regulate and supervise the Tourism Enterprise Zones (TEZs) established under R.A. 9593; develop, manage, and supervise tourism infrastructure projects in the country; and continue to exercise functions previously exercised by the PTA under Presidential Decree No. 564, not otherwise inconsistent with the other provisions of R.A. 9593.

TIEZA acknowledges the importance of determining stakeholder and customer satisfaction as it pursues its mandate. By measuring the results of customer feedbacks in the products and services offered, TIEZA will have a basis for necessitating projects, activities and programs that will lead to the improvement of product/service delivery. This will be done through the conduct of TIEZA's 2020 Customer Satisfaction Survey to be conducted by an independent third-party company that is an expert on conducting such projects.

Conduct of the 2020 Customer Satisfaction Survey (CSS) shall be guided by R.A. 10149 otherwise known as the "GOCC Governance Act of 2011", E.O. 605, s. 2007 "Institutionalizing the Structure, Mechanisms and Standards to Implement the Government Quality Management Program", ISO 9001:2015 and the Governance Commission for GOCCs' (GCG) *"Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey"* and the *"Additional Guidelines in the Conduct of the Customer Satisfaction Survey (CSS) for 2020 in the GOCC sector dated August 14, 2020"*.

#### **Standard Guideline of GCG (2020)**

As required in GCG Memorandum Circular (MC) 2012-07 Code of Corporate Governance, GOCC Governing Boards are required to:

- a) Ensure integrity and honesty in dealings with customers and operate a highly effective 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 staff, to take best advantage of advances in all aspect of society in order to ensure that it continues to add value to its customer businesses.

To ensure GOCCs such as TIEZA are able to satisfy these requirements, the GCG made it mandatory for GOCCs to conduct an annual Customer Satisfaction Survey (CSS) as one of the performance indicators under the Performance Evaluation System (PES). Anchored on the principle of continuous improvement, an enhanced guideline for CSS was developed by the GCG and shall be applied by GOCCs starting on 2020.

The primary reference for this undertaking is GCG's *Enhance Standard Methodology for the Conduct of the Customer Satisfaction Survey*. However, due to the impact and circumstances caused by the Covid-19 pandemic, GCG issued "*Additional Guidelines in the Conduct of the Customer Satisfaction Survey*" (August 14, 2020). The latter document relaxed some provisions of the guidelines to somehow adapt to the issues and uncontrollable situation brought about by this public health emergency.

### **Data Gathering Methods**

Based on the guidelines established by GCG, specific data gathering methods will be used depending on the identified target respondent (Annex A - Classification of GOCCs According to Survey Methodology) Hereunder are the methodologies required by GCG for the different TIEZA clientele:

a.) **Intercept (Travel Tax Payers/Applicant)** – Objective of the intercept interview is to gather on-site feedback from customers upon transaction with TIEZA. Intercept interviews are done by having trained interviewers positioned in either the main office, satellite offices or airport counters of TIEZA.

b.) **Telephone or Face – to Face Interview (TEZ Operators, Tourism Enterprises, LGUs, Customer in Operating Assets)** - Telephone interview is the is the most efficient way of reaching customers who do not usually visit the main office, satellite offices and assets of TIEZA. Face –to – face interview may be conducted as well depending on the convenience of the respondents. The respondents that will participate in the interview should come from the official list of clients (individuals, corporations, and non-profit organizations). In using this methodology, the complete contact information including the names and contact details are required.

However, GCG's "*Additional Guidelines in the Conduct of the Customer Satisfaction Survey*" (August 14, 2020) provided key recommendations/modifications that may be taken up if issues relating to the ongoing pandemic are encountered.

### **Data Collection and Data Collection Instrument**

The data to be collected must strictly abide with the requirements set forth in Section IV and VI of the *Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey* and questions must be strictly guided by the *Survey Questionnaires for the Conduct of the CSS 2020 for TIEZA* (Annex B).

### **Sample Universe and Size**

The sample universe and sample size for this project must be in accordance with the guideline stated in sections IV B and C of the *Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey*.

### **Objectives**

- a.) Generate feedback from identified clients, customers and stakeholders of TIEZA;
- b.) Enable TIEZA to measure its performance in delivering its service to stakeholders based on satisfaction metrics and variables as identified by GCG – Timeliness; Ease of Access; Staff; Quality; and Outcome;
- c.) Identify specific actions that TIEZA can take to improve product and service delivery

d.) Be able to identify organizational risks and opportunities guided by the ISO 9001: 2015 standards

e.) Comply with the good governance conditions of GCG

### Scope of Work

The Service Provider must commit to the following:

- Develop a composite measure of client satisfaction and use it to determine the overall rating of the current level of satisfaction
- Determine the quality of service delivery as perceived by clients
- Identify gaps in service delivery
- Identify the sources of client complaints/dissatisfaction in regard to service delivery
- Provide thorough analysis of survey results and necessary recommendations
- Proposed product and service improvement measures
- Prepare and deliver a Comprehensive Final Report

### Key Personnel Required

The minimum key personnel in conformity with the required research/survey team composition and structure as stated in GCG's guidelines are as follows:

- Overall Project Manager (1)
- Assistant Project Manager (2)
- Field Manager (1)
- Data Processing Manager (1)
- Field Supervisors (at least per major area)
- Data Processing Supervisors (2)
- Programmers/Scripters - including checker (2)
- Data Processing Assistants - including checker (2)
- Group Leaders (at least 1 for every 5 interviewers)
- Field Interviewers (depends on the sample size; maximum number of interviews per interviewer should only be 15% of the total sample)
- Coders (depends on the number of questions to be coded)
- Field Quality Checkers/Back-checkers (depends on the sample size; should be able to back-check at least 30% of the total sample size)

The identified personnel must have at least three (3) years of experience in relation to their function and have **at least handled or is currently handling a CSS project for a GCG supervised GOCC.**

### Status Reports and Documents for Submission

The service provider must submit the following documents while the project is on-going:

Activity	Document for Submission
Pre-test	Survey Instrument Stimulus Materials Pre-Test Results Pre-Test Report
Training	Survey Instrument Stimulus Materials Training Manual

	Training Report
Project Kick-Off/Start-Off	Survey Instrument Stimulus Materials Observation Report Clearing/Debriefing Report
Project Implementation	Supervision/Observation Report Fieldwork Report
Back-checking and spot checking	Back-checking and Spot-checking Report
Data Processing	Spot Checking Report for Data Processing and Quality Control
Analysis	Final Report

### Contract Duration

The suggested duration for this Customer Satisfaction Survey Project is **one hundred twenty (120) calendar days** upon issuance of the Notice to Proceed (NTP).

### Timeline

#### Phase 1

Within Seven (7) days upon issuance of NTP

- Pre-Test
- Training
- Project Kick-off/Start-off

#### Phase 2

Q4 2020-February 2021

- Project Implementation
- Actual survey for customers/clients of Travel Tax Services, Asset Management Sector, Tourism Enterprise Zone Management Sector, and Architectural and Engineering Services Sector
- Spot Checking Report for Data Processing and Quality Control

#### Phase 3

Q1 2021

- Exit briefing of the CSS results
- Submission of the Final Comprehensive TIEZA Customer Survey Satisfaction Report 2020 **(March 15, 2021 Deadline)**
- Transfer of Technology

### Minimum Required Content for the Final Report

1. Data Gathering Methodology (i.e. sampling procedure, total primary customers, sample size used, survey methodology, frequency of data collection)
2. Percentage of Satisfied Customers using Top 2 Box (Very satisfied and satisfied)
3. Average of the Overall Satisfaction Rating
4. Comparative Analysis of Survey Results based on 2019 findings;
5. Crosstabs of the Reasons for Overall Satisfaction Rating against Type of Raters (Positive and Negative) to determine Top Reasons for Satisfaction and Top Reasons for Dissatisfaction
6. Derived Importance (Correlation and Kruskal Analysis)
7. Scatter Diagram

**Evaluation of Proposals**

The proposals shall be evaluated using the Quality-Based Cost Evaluation. The technical proposal shall be given a weight of 70% whereas the financial proposal shall be given a weight of 30%.

Evaluation Criteria	Weight	Minimum Score
<b>Technical Proposal</b>	<b>70%</b>	
Applicable Years of Experience of the Consultant/Firm (15%)		
Similar Projects Completed (15%)		
Qualification of personnel who shall be assigned to the project (15%)		
Research Design (25%)		
<b>Financial Proposal</b>	<b>30%</b>	
<b>TOTAL</b>	<b>100%</b>	<b>75%</b>

**Terms of Payment**

*Progress Billing: Phase 1 (15%) Submission of Pre-Test Report and Training Report  
 Phase 2 (35%) Submission of Project Implementation Report  
 Phase 3 (50%) Submission of Final Report on TIEZA's 2020 CSS*

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