

TERMS OF REFERENCE

For the Engagement of a Service Provider for the 2023 Client Satisfaction Measurement

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 the level of customer satisfaction in pursuance of its mandate. By measuring the results of customer feedback 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 2023 Client Satisfaction Measurement to be conducted by an independent third-party company that is an expert on conducting such projects.

Conduct of the 2023 Client Satisfaction Measurement (CSM) shall be guided by the following laws and regulations:

- R.A. 10149 "GOCC Governance Act of 2011";
- E.O. 605, s. 2007 "Institutionalizing the Structure, Mechanisms and Standards to Implement the Government Quality Management Program";
- R.A. 11032 "Ease of Doing Business and Efficient Government Service Delivery Act of 2018";
- ARTA MC No. 2019-002 "Guidelines on the Implementation of the Citizen's Charter in Compliance with RA 11032 and Its Implementing Rules and Regulations;
- ARTA MC No. 2022-05 "Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement"; and
- GCG & ARTA JMC No.1 s. 2023 "Supplemental Guidelines to the ARTA MC No. 2022-05"; and
- ISO 9001:2015

Guidelines on Client Satisfaction Measurement (2023)

Pursuant to Joint Memorandum Circular No. 1 s. 2023, all GOCCs are required to implement the Harmonized Client Satisfaction Measurement to:

- a) Promote the adoption of a harmonized and standardized framework in measuring client satisfaction across all levels of the government that will ensure continuous improvement and enhancement of service promise towards a more meaningful client-centered Citizen's Charter.
- b) Have a client satisfaction survey that is applicable to every government agency and is reported in a uniform manner.

c) Have an after-service availment survey that will assess the overall satisfaction and perception of clients on the government service they availed. This will provide relevant feedback to the agency on the quality of service they are providing. The output and results of the CSM shall be incorporated in the agency's Report Card Survey (RCS) under the Overall Survey Results.

The Governance Commission for GOCCs (GCG) and the Anti-Red Tape Authority (ARTA) signed a Joint Memorandum Circular (JMC) on 12 April 2023 highlighting the adoption of a synchronized framework in determining client satisfaction across the GOCC sector to ensure continuous improvement and enhancement of service to the Filipino people. It is included in the provisions of the JMC that all GOCCs shall conduct their respective CSM for all its external and internal services either through a third-party service provider or an in-house survey, as required by the GCG performance scorecard, and shall be in accordance with the prescribed guidelines of the ARTA MC No. 2022-05.

Data Gathering Methods

Based on the guidelines established by GCG and ARTA, government agencies are encouraged to implement the CSM using various data gathering methods, to the greatest extent feasible, to maximize response rates.

1. On-site Conduct - This may be done through a paper survey questionnaire. TIEZA may utilize electronic platforms in providing questionnaires to the respondents.
2. Remote Conduct - This may be administered to remote respondents through electronic mail, the website, social media, QR Code, or other similar modes.
3. Collection Mechanism - The manner and time interval of the collection of paper survey questionnaires shall be at the discretion of the agencies and offices. It shall be brief to maximize the responses and shall maintain the confidentiality of clients.

Data Collection and Data Collection Instrument

The data to be collected must strictly abide with the requirements set forth in section 4.3.4 of the *Harmonized Client Satisfaction Measurement*.

Sample Universe and Size

The sample universe and sample size for this project must be in accordance to the guideline stated in section 4.3.3 of the *Harmonized Client Satisfaction Measurement*.

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 the Authority as stated in *Annex A - Client Satisfaction Measurement Questionnaire*. The CSM includes three (3) questions related to the Citizen's Charter, client's overall satisfaction with the service availed of, and eight (8) questions related to the following Service Quality Dimensions (SQD): Responsiveness, Reliability, Access and Facilities, Communication, Costs, Integrity, Assurance, 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:

- Use the CSM questions as prescribed by the Authority as stated in Annex A - Client Satisfaction Measurement Questionnaire with the appropriate method to maximize response
- Conduct the survey on all clients of the organization for CY 2023. (January to December)
- The scope section of the CSM Report shall include the period the survey was conducted and the geographical coverage of the survey.
- The report shall include a table of the agency's services, the number of clients that completed the survey, and the total number of transactions during the year (surveyed + unsurveyed clients).
- 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 Client Satisfaction Measurement Report following the template/outline provided in *Annex B - Client Satisfaction Measurement 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 handled at least three (3) similar projects.

Minimum Required Content for the Final Report

The Third-Party Service Provider shall present the results following the template/outline provided in *Annex B - Client Satisfaction Measurement Report of ARTA MC 2022-05 (Guidelines on the Implementation of the HCSM)*

1. Scope and Methodology (Period covered, Geographic and Office coverage, List of services Surveyed, Sampling, Feedback and Collection Mechanism, Scoring System, Interpretation of Numerical Results)
2. Results (Response rates per service and customer type, Total number of transacting clients during the period, Client Demographic, Citizen's Charter results, Service Quality Dimension results, Free responses)
3. Continuous Agency Improvement Plan for the following year
4. Index (Clear image of physical CSM used, Detailed list of regional and satellite offices covered, CSM results of each regional and satellite office)

Additional Contents:

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 2022 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

Status Reports and Documents for Submission

The service provider must submit the following documents at the end of every quarter 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

Submission of the Final Comprehensive TIEZA 2023 Client Satisfaction Measurement shall be submitted on or before **March 14, 2024**.

PROJECT TIME FRAME AND PAYMENT SCHEDULE

Contract Duration

The suggested duration for this 2023 Client Satisfaction Measurement Project is one-hundred fifty (150) calendar days upon issuance of the Notice to Proceed (NTP) but **must be completed on or before 14 March 2024**.

Timeline

Date	Activities/Deliverables
October 2023	<u>Phase 1</u> <ul style="list-style-type: none"> • Pre-Test • Training • Project Kick-off/Start-off
November – December 2023	<u>Phase 2</u> <ul style="list-style-type: none"> • 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
15 January 2024	Focus Group Discussion
31 January 2024	Submission of the Draft Full Report - 1 st Draft
15 February 2024	Submission of the Draft Full Report - 2 nd Draft
29 February 2024	<u>Phase 3</u> <ul style="list-style-type: none"> • Exit briefing • Transfer of Technology
8 March 2024	Submission of the the Final Comprehensive TIEZA 2023 Client Satisfaction Measurement (in hard copies and digital format)
14 March 2024	Presentation of the Final Comprehensive TIEZA 2023 Client Satisfaction Measurement to the Management Committee

Approved Budget for the Contract (ABC)

The approved budget for the Contract is **Two Million Pesos Only (Php2,000,000.00)**, all-in, inclusive of all applicable taxes, logistics, permit fees, transportation, out-of-pocket, and all other related expenses necessary to completely accomplish the project.

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 2023 CSM

Penalties:

- a.) Project Implementation shall be based on a detailed project timetable to be agreed upon between TIEZA and Third-Party Service Provider based on identified outputs/milestones.
- b.) If the Third-Party Service Provider fails to deliver any or all of the services within the period(s) specified in the contract, TIEZA shall, without prejudice to its other remedies under the contract and under the Applicable Law, deduct from the contract price, as liquidated damages, a sum equivalent to one-tenth of one percent of the unperformed portion of the services for each day of delay based on the approved contract schedule. Once the maximum amount of liquidated damages reaches ten percent (10%) of the total amount of the contract, TIEZA may consider termination of the contract pursuant to General Conditions of Contract (GCC) Clause 27.
- c.) Payment of incomplete services will be based on quantum meruit.
- d.) In the event error/s or inconsistency/ies during project implementation is/are committed by the Third-Party Service Provider, the cost of undertaking corrective activities or actions, as may be necessary, shall be shouldered by the Third-Party Service Provider.
- e.) TIEZA reserves the right to refuse acceptance of outputs/deliverables submitted by the Third-Party Service Provider which are found bearing inaccurate/questionable content (i.e., data/findings/insights) or sub-standard quality of presentation. The Third-Party Service Provider shall be given the chance to remedy the rejected outputs/deliverables through re-work, revisions or amendments.
- f.) In the event the GCG and ARTA, the regulatory body that requires and governs the conduct of the CSM, issues directives that will require TIEZA to adopt modifications to the standards and procedures in the conduct of CSM, TIEZA reserved the right to apply such modification in the terms stated herein to conform to the issuance or directive of the GCG or ARTA.

Confidentiality and Data Privacy

- a.) The Third-Party Service Provider shall ensure that all information shared by TIEZA under this project shall remain confidential even after the termination of the contract;
- b.) The Third-Party Service Provider shall be required to follow the rules on confidentiality and code of ethics as applicable to officials of the public service;
- c.) The Third-Party Service Provider shall be required to comply with the provisions of RA No. 10173 (Data Privacy Act) in the collection and processing of personal information of data subjects, including the execution of a data sharing agreement with TIEZA, as may be warranted.

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
Technical Proposal	70%	
Applicable Years of Experience of the Consultant/Firm (15%)		
Similar Projects Completed (15%)		
Qualification of personnel who shall be assigned to the project (15%)		
Project Design (25%)		
Financial Proposal	30%	
TOTAL	100%	75%

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