

TERMS OF REFERENCE

Engagement of a Third-Party Service Provider for the Data Analysis of Results for the 2023 PDIC Client Satisfaction Measurement Survey

I. BACKGROUND

In 2023, the Anti Red Tape Authority (ARTA) and the Governance Commission for GOCCs (GCG) issued a joint memorandum circular¹ on the conduct of the Client Satisfaction Measurement (CSM), which shall be the survey methodology and standards to be followed by all GOCCs. In addition, the conduct of the CSM directly supports and measures one of PDIC's Strategic Objectives for 2023.

The GCG has provided option for agencies to engage the services of a third-party provider or in-house services for the conduct the CSM survey.

While PDIC has opted to conduct the survey in-house, we have also opted to engage a service provider to handle the data analysis of the survey results. This is in fulfillment of PDIC's performance commitment to better serve its clients and improve its services, systems, and processes.

II. OBJECTIVES

The service provider shall be engaged to analyze results of the CSM Survey and report the results of the data analysis.

III. SCOPE OF WORK AND DELIVERABLES

- A. Conduct quality control and assurance (i.e., *backchecking and double encoding*), data analysis, and data interpretation of survey results based on administered survey and those that were administered by PDIC;
- B. Submit and present to the PDIC Management and/or Board of Directors a final report on the results of the survey, including results of quality control/quality assurance (i.e., *backchecking and double encoding*), and highlighting areas with significant co-relation to operations and service delivery, trends, and key findings.

¹Joint Memorandum Circular No. 1 Series of 2023, 12 April 2023 – Supplemental Guidelines to the ARTA Memorandum Circular No. 1022-05 or the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement Specific for GOCCs covered by Republic Act No. 10149.

IV. MINIMUM QUALIFICATIONS

A. SERVICE PROVIDER

The third-party service provider shall be an organization that meets the following minimum qualifications:

1. At least five-year experience in the design, and administration of market research and customer surveys, including customer satisfaction surveys and analysis;
2. Has a team of professionals in the field of market and customer studies, social research studies, and statistics and quantitative research, with knowledge and familiarity in ESOMAR codes and guidelines;
3. Has completed similar studies measuring customer satisfaction in government agencies, financial services, and/or banking institutions; and
4. Has in-house facilities and systems that will efficiently and effectively process survey results.

B. MEMBERS OF THE TEAM

The third-party service provider shall form an adequate survey team of at least five (5) members composed of a Project Manager, Assistant Project Manager, Statistician and Technical Staff/ Interviewers (refer to Section IV.A for details on minimum qualifications and Table below for roles) to carry out the following: (a) conduct quality control and assurance; (b) determine the response rate and target sampling with acceptable levels of statistical significance; and c) analyze data from the target respondents;

Role/Position	Qualifications
1 Project Manager/Team Leader	<p>Graduate of a relevant four-year course.</p> <p>Has at least five (5) years of relevant experience in the conduct of quantitative-based research particularly conduct of surveys for a financial firm or government agency</p> <p>Has managed or led at least two similar projects in the last five years</p>
1 Assistant Project Manager	<p>Graduate of a relevant four-year course</p> <p>Has at least five (5) years of relevant experience in the conduct of quantitative-based research particularly conduct of surveys for a financial firm or government agency</p> <p>Has assisted and supervised at least two similar projects</p>
1 Statistician	<p>A graduate of Bachelor of Science in Statistics or similar course</p> <p>Has at least five (5) years of relevant experience in quantitative-based research, customer or market survey for a financial firm or government agency</p>
At least 2 Technical Staff / Interviewers	<p>College graduates</p> <p>Has at least three (3) years of relevant experience in the conduct of surveys, intercepting and interviewing survey respondents</p> <p>Has experience in collecting and encoding survey data</p> <p>Familiarity with ESOMAR guidelines, survey programs and applications for encoding, and storing survey data</p>

V. TASKS AND DURATION

The Project will be undertaken by the service provider within a three-month period from the effectivity of engagement:

Tasks	Deliverables	Timeline	Payment Terms
<p>1. Data Processing and Analysis of Survey Results</p>	<p>1.1 Receipt of survey results for January to December 2023 from PDIC</p> <p>1.2 Validation of survey data (see Annex A for minimum number of client responses for validation)</p> <p>1.3 Submission to PDIC of the following:</p> <ul style="list-style-type: none"> a. Survey tabulation with initial summary results for respondents b. Survey report with analysis of responses per dimension, statistical notes and comparative statistics, and analysis of qualitative data 	<p>March 2024</p> <p>March – April 2024</p> <p>7-10 calendar days after <u>receipt and validation of survey results from PDIC</u></p> <p>10-15 calendar days after <u>receipt and validation of survey results from PDIC</u></p>	<p>60%</p> <p>Upon acceptance of initial survey tabulation and report by PDIC</p>
<p>2. Submission of Final Survey Report and Analysis</p>	<p>2.1 Presentation to the President/Executive Committee of the Full Report</p> <p>2.2 Submission of the Final Report</p>	<p>April 2024</p> <p>Within twenty (20) working days after presentation of Full Report</p>	<p>40%</p> <p>Upon acceptance by PDIC of the Final Report</p>

The Institutional Relations Department of the Corporate Affairs Group (CAG) shall provide overall supervision in the implementation of the contract and in monitoring the performance of the service provider.

The deliverables of the service provider will be presented to a committee or working group designated to review the progress and acceptability of the outputs and address issues/concerns raised in the implementation of the project.

VI. EVALUATION PROCEDURE

The engagement Project will be awarded to the lowest calculated and responsive bid.

VII. BUDGET

Budget allocated for the payment for the engagement of the service provider is ₱ 670,000.00 (inclusive of all taxes).