

# PART I

# Request for Proposal

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*PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)*

**BASES CONVERSION AND DEVELOPMENT AUTHORITY**

**REQUEST FOR PROPOSAL (RFP)**

***PROCUREMENT OF CONSULTING SERVICES  
FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

1. The Bases Conversion and Development Authority (BCDA) is a government corporation mandated to transform former military bases and properties into premier centers of economic growth.
2. BCDA acknowledges the importance of stakeholder satisfaction as it pursues its mandate of development. By measuring stakeholders' feedback toward its programs and services, BCDA has the basis for necessitating improvements in its operations.
3. The establishment of a feedback mechanism will be done through the conduct of the BCDA 2023 Client Satisfaction Measurement (also known as the BCDA 2023 Stakeholder Satisfaction Study), which is a requirement of the Anti-Red Tape Authority (ARTA) and the Governance Commission for Government-Owned or -Controlled Corporations (GCG).
4. BCDA will procure and engage a Consultant that will provide professional expertise on the data management, interpretation and analysis requirements of the BCDA 2023 Client Satisfaction Measure Report.
5. The BCDA through the *2023 Corporate Operating Budget* intends to apply the sum of *Six Hundred Thousand Pesos (Php600,000.00)*, inclusive of all applicable taxes and fees, being the Approved Budget for the Contract (ABC) to payments under the contract for the ***Procurement of Consulting Services for the BCDA 2023 Client Satisfaction Measurement.*** Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
6. The Consultant shall have the following minimum qualifications:
  - A. The CONSULTANT must strictly be a reputable research and/or communications firm which has been in operations for at least two (2) years. In the case of joint ventures, the lead consulting firm should have at least two (2) years of business operation.
  - B. The CONSULTANT must have completed at least three (3) research projects which are similar in nature to the requirement within the past two years (e.g. evaluative research, survey, stakeholder relations studies, etc.)

- C. The CONSULTANT must provide the necessary manpower support for the conduct of the Customer Satisfaction Measurement Report, based on the ARTA guidelines;
  - D. The **research team** must be composed of the following four (4) key members: **OVERALL PROJECT MANAGER, RESEARCH EXECUTIVE/ANALYST, DATA PROCESSING MANAGER AND LEAD STATISTICIAN.**
  - E. The identified members of the proposed research team must have at least three (3) years experience in communications research as related to his function in the team.
  - F. The identified members of the proposed research team must have handled at least three (3) research projects (e.g. evaluative research, survey, stakeholder relations studies, etc.) which are similar in nature to the requirement in a capacity related to his/her function in the team.
  - G. The identified members of the proposed research team must have at least a bachelor's degree and at least eight (8) aggregate hours of training relevant to nominated position in the last eight (8) years).
  - H. The CONSULTANT must be registered online with the Philippine Government Electronic Procurement System (<http://www.philgeps.gov.ph>) as a legitimate service provider for government requirements. The CONSULTANT is mandated to register with the PhilGEPS and provide a PhilGEPS Registration number as a condition for award of the contract.
  - I. The CONSULTANT shall be assessed based on the most favorable compliance with the criteria.
7. The CONSULTANT to be hired shall undertake within the agreed schedule all relevant and necessary activities such as, but not limited to, data encoding, data processing, validation, evaluation and interpretation of results, preparation of final reports in accordance with the *GCG-ARTA Joint Memorandum Circular No. 1, Series of 2023 or the Supplemental Guidelines to the ARTA Memorandum Circular No. 2022-05 or the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement Specific for GOCCs Covered by Republic Act No. 10149, and any other GCG-ARTA-related issuances.*

The timely submission and presentation of the project to the BCDA and preparation of all other related activities to fulfill the requirements of the project shall be included.

The scope of work includes the following:

- A. The CONSULTANT shall provide guidance to BCDA and ensure that sampling and data-gathering/collection methods are compliant with the ARTA-GCG Guidelines for the Conduct of the Harmonized Client Satisfaction Measurement (HCSM). The

- Consultant shall ensure that the minimum required number of respondents per service availed is met as validated by the Sample Size Calculator provided by the ARTA for the conduct of the HCSM. The Consultant shall ensure that response rates are also maximized based on acceptable data gathering methods;
- B. The CONSULTANT shall perform data encoding of results gathered by BCDA, anchored on the responses to the ARTA-prescribed Client Satisfaction Measurement Questionnaire;
  - C. The CONSULTANT shall process all gathered data to determine the level of satisfaction of stakeholders within the prescribed period of the HCSM;
  - D. The CONSULTANT shall determine the final scoring per question in the Client Satisfaction Measurement Questionnaire and the overall scoring for satisfaction guided by the prescribed ARTA methodology. This shall be presented as part of the Final HCSM Report with supporting tables and figures as prescribed. The Consultant shall determine in the Report the overall satisfaction/dissatisfaction rating, the reasons for the satisfaction/dissatisfaction rating and the factors contributing to the satisfaction/dissatisfaction rating, based on the available responses;
  - E. The CONSULTANT shall present the results by indicating the following: response rates per service; total number of transacting clients during the period covered; client demographics; Citizen's Charter results; Service Quality Dimension results, and free responses derived from the response in the ARTA-prescribed questionnaire;
  - F. The CONSULTANT shall perform data interpretation and analysis of the results of the 2023 HCSM. This analysis shall reflect aspects/attributes for improvement as well as performance highlights during the year;
  - G. The CONSULTANT shall guide the BCDA in the preparation of its Continuous Agency Improvement Plan for the following year and present this as part of the HCSM Final Report. These shall contain the action steps, the responsible unit/person, and a timeline.
  - H. The CONSULTANT shall prepare and complete the Final Report in accordance with the Client Satisfaction Measurement Report Outline in Annex B of the GCG-ARTA *Joint Memorandum Circular No. 1, Series of 2023 or the Supplemental Guidelines to the ARTA Memorandum Circular No. 2022-05*.
  - I. The CONSULTANT shall present to BCDA Management the results of the 2023 BCDA Client Satisfaction Measurement Report to derive their inputs and comments for implementation in the Final Report that will be submitted to the ARTA. A summary of the results is also requested for immediate reference.

- J. The CONSULTANT shall attend meetings with key BCDA departments, if necessary, for the smooth conduct of the 2023 BCDA Customer Satisfaction Measurement.
- K. The CONSULTANT shall adhere to the following timeline:

<b>Deliverables</b>	<b>Schedule</b>
Data Encoding	December 2023- January 12, 2024
Data Processing and Analysis	January 15 - 26, 2024
Preparation of Initial Report	January 29 - February 8, 2024
Submission of Survey Results and Initial Presentation to PAD	February 9, 2024, Friday
Presentation to MANCOM	February 15, 2024 Thursday
Gathering of Action Plan from BCDA Departments	March 4 -15, 2024
Collation and Final Report Preparation	March 18-29, 2024
Submission of Final Report to BCDA/ Approval of the President and CEO	April 1, 2024, Monday
Submission to ARTA	April 12, 2024, Friday

- L. The CONSULTANT shall shoulder the compensation of the project team and support staff that will be engaged for the conduct and preparation of the HCSM Report, as well as the expenses for meals, and transportation, if relevant.

8. The BCDA shall draw up a list of consultants from those who have submitted their Technical Proposal and Financial Proposal, in accordance with the provisions of the revised Implementing Rules and Regulations (IRR) of Republic Act 9184 (R.A. 9184).
9. The CONSULTANT shall be evaluated based on the *Quality Cost Based Evaluation (QCBE)* procedure wherein the Technical and Financial Proposal are given weights of 85% and 15%, respectively. The QCBE procedure is described under Section 33.2.1b of Republic Act 9184 and its 2016 Implementing Rules and Regulations.



10. The criteria and rating system for the selection of the winning consultant are as follows:

Evaluation Criteria	Weight	Minimum Technical Score
<b>Technical Proposal</b>	<b>85%</b>	<b>70%</b>
Applicable Years of Experience of the Consultant/Firm (40%)	40%	
Qualification of personnel who shall be assigned to the project (20%)	20%	
Plan of Approach and Methodology	40%	
<b>Financial Proposal</b>	<b>15%</b>	
<b>TOTAL SCORE</b>	<b>100%</b>	

The **Minimum Technical Score** of 70% should be met.

10. The CONSULTANT is also required to submit the following documents to be used by BCDA as bases for the technical evaluation.

For the Technical Proposal: The CONSULTANT is required to submit the following documents described in Annex H of the Revised IRR of RA 9184 under “Appendix A: Documentary Requirement of Alternative Methods of Procurement as bases for technical evaluation by BCDA.

Tab No.	Form No.	Description
<b>TECHNICAL PROPOSAL</b>		
1	EF 1	Eligibility Documents Submission Form
2	-	<ul style="list-style-type: none"> <li>PhilGEPS Certification of Registration under Platinum Membership or Red Membership (all pages) pursuant to Section 8.5.2 of the 2016 revised IRR.</li> <li>Mayor’s/Business Permit or recently expired Mayor’s permit, the official receipt for renewal within the period prescribed by the concerned local government unit and the recently expired Mayor’s permit shall be submitted, in case of PhilGEPS Certification of Registration under Red Membership is submitted.</li> <li>Latest Income/Business Tax Return, in case of PhilGEPS Certification of Registration under Red Membership is submitted.</li> </ul>
3	TPF 1	Statement of All Completed Government and Private Contracts, For The Past 2 Years

4	TPF 2	Summary of Completed Projects for the Past 2 Years (All completed government and private contracts)
5	TPF 3	Summary of Curriculum Vitae
6	TPF4	Curriculum Vitae (CV) for Proposed Professional Staff
6.1	TPF 4A	Over-all Project Manager
6.2	TPF 4B	Research Executive/Analyst
6.3	TPF 4C	Data Processing Manager
6.4	TPF 4D	Lead Statistician
7	TPF 5	Format of Curriculum Vitae (CV) of the Firm/Entity
8	TPF 6	Certificate of Availability of Key Personnel
9	TPF 7	Plan of Approach and Methodology
<b>FINANCIAL PROPOSAL</b>		
10	FPF 1	Financial Proposal Submission Form
12		Omnibus Sworn Statement

For the Financial Proposal: The CONSULTANT is also required to submit the Financial Proposal in a separate sealed envelope together with the above-mentioned requirements/documents. The financial proposals shall not exceed the approved budget for the contract and shall be deemed to include the cost of all taxes, duties, fees, levies and other charges imposed under applicable laws. Only the financial proposals of the consultants who meet the minimum technical score of 70% will be opened.

- This contract shall be effective for six (6) months commencing from the date stated in the Notice to Proceed with an Approved Budget of the Contract (ABC) of **Six Hundred Thousand Pesos Only (Php600,000.00), inclusive of applicable taxes and fees.** The CONSULTANT will be paid in full upon submission to and acceptance by BCDA of the Final Report on the BCDA 2023 Client Satisfaction Measurement as indicated in Section IX. of the Terms of Reference.

11. **Pre-Bid Conference.** The BCDA will hold a Pre-Bid Conference on **14 November 2023, 1:00 PM**, at BCDA Corporate Center, 2nd Floor Bonifacio Technology Center, 31st Street corner 2nd Avenue, Bonifacio Global City, Taguig City and/or through video conferencing via:

**Zoom Link for the Meeting**

<https://tinyurl.com/CSMPreBidConference>

Meeting ID: 931 0408 8497 | Passcode: 109791

12. **Deadline for Submission of Proposal.** The Bid Proposal must be duly received through manual/physical submission at the at BCDA Corporate Center, 2nd Floor Bonifacio Technology Center, 31st Street corner 2nd Avenue, Bonifacio Global City, Taguig City on or before **17 November 2023, 9:00 a.m.** Late submission of Bid Proposal shall not be accepted. The bidders may submit their Bid Proposal before the deadline for submission of bids to avoid late submission. The editable bid forms may be downloaded using the link below:

<https://tinyurl.com/CSMBiddingForms>

13. **Opening of Bid Proposals.** Opening of Bid Proposals shall be on **17 November 2023, 10:00 AM** at the BCDA Corporate Center, 2nd Floor Bonifacio Technology Center, 31st Street corner 2nd Avenue, Bonifacio Global City, Taguig City and through video conferencing via:

**Zoom Link for the Meeting:**

<https://tinyurl.com/CSMOpeningofProposals>

Meeting ID: 936 3737 3383 | Passcode: 022502

14. The Technical and Financial Proposals shall be submitted by hand to the address below:

**LEILANI BARLONGAY-MACASAET**

Vice President, Public Affairs Department  
Bases Conversion and Development Authority  
2<sup>nd</sup> Floor, Bonifacio Technology Center  
31<sup>st</sup> Street corner 2nd Avenue, Bonifacio Global City, Taguig City 1634

Your office may also contact Public Relations Officer IV, Mr Garry A. Cativo, thru office number (02) 8575-1732 and email address [gacativo@bcda.gov.ph](mailto:gacativo@bcda.gov.ph).

15. Please be reminded that the reference time that will be followed shall be the computer system clock at the **BCDA Central Receiving and Releasing Area (CRRA)**, BCDA Corporate Center, 2nd Floor Bonifacio Technology Center, 31st Street corner 2nd Avenue, Bonifacio Global City, Taguig City. All bidder are advised to synchronize their timepieces therewith.



16. BCDA reserves the right to accept or reject any and all bids, annul the procurement process or not award the contract at any time prior to contract award, without thereby incurring any liability to the affected bidder. BCDA reserves the right to waive minor defects in forms and requirements as long as they do not affect the genuineness and authenticity of the documents submitted.



**LEILANI BARLONGAY-MACASAET**

Vice President

Public Affairs Department

**BACC2023-0342**

# **PART II**

# **Bidding Forms and Templates**

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*PROCUREMENT OF CONSULTING SERVICES  
FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)*

**BASES CONVERSION AND DEVELOPMENT AUTHORITY**

***PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

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## EF 1. ELIGIBILITY DOCUMENTS SUBMISSION FORM

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***PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

[Letterhead]

[Date]

**Leilani Barlongay-Macasaet**  
**Vice President, Public Affairs Department**  
**Bases Conversion and Development Authority**  
BCDA Corporate Center, 2/F Bonifacio Technology Center  
31st Street corner 2nd Avenue, Bonifacio Global City, Taguig City.

Ladies/Gentlemen:

In connection with your Request for Proposal dated **(Date)** for the **Procurement of Consulting Services for the 2023 BCDA Client Satisfaction Measurement (CSM)**, **[Name of Consultant]** hereby expresses interest in participating in the bidding for the said consulting services and submits the attached Eligibility Documents.

In line with this submission, we certify that:

- a) **[Name of Consultant]** is not blacklisted or barred from bidding by the GOP or any of its agencies, offices, corporations, or LGUs, including foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board; and
- b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct. We acknowledge that any mis-representation or submission of fake or tampered documents by the **[Name of Consultant]**, its partner/s (in case of Joint Venture or partnership) or sub-contractor, or any of the key personnel nominated by the Consultant shall automatically result in disqualification of the Consultant from the consulting services and shall be grounds for blacklisting pursuant to Section 4.1 of Appendix 17 of the Revised IRR of RA 9184.

We acknowledge and accept BCDA's right to inspect and audit all records relating to our submission irrespective of whether we are declared or not.

We further acknowledge that failure to sign this Eligibility Document Submission Form shall be a ground for our disqualification.

Yours sincerely,

**[Signature over printed name of Authorized Signatory of the Firm/JV/Consortium]**

[Title]

Date: \_\_\_\_\_

**TPF 1. STATEMENT OF ALL COMPLETED GOVERNMENT AND PRIVATE CONTRACTS,  
INCLUDING CONTRACTS AWARDED BUT NOT YET STARTED AS WELL AS  
CONTRACTS WHERE WORKS HAVE BEEN COMPLETED BUT NOT YET ACCEPTED  
FOR FOR THE PAST 2 YEARS**

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***PROCUREMENT OF CONSULTING SERVICES  
FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

**[Letterhead]**

**[Date]**

**Leilani Barlongay-Macasaet**  
**Vice President, Public Affairs Department**  
**Bases Conversion and Development Authority**  
BCDA Corporate Center, 2/F Bonifacio Technology Center  
31st Street corner 2nd Avenue, Bonifacio Global City, Taguig City.

Ladies/Gentlemen:

In compliance with the eligibility requirements of the Bids and Awards Committee for Consulting Services of the Bases Conversion and Development Authority for the **Procurement of Consulting Services for the BCDA Client Satisfaction Measurement (CSM)**, we certify that **[Name of Consultant]** has **completed government and private contracts**, as enumerated in TPF 2. Summary of Consulting Services.

Sincerely,

**[Signature over printed name of Authorized Signatory of the Firm/JV/Consortium]**

**[Title]**

**Date:** \_\_\_\_\_

**TPF 2. SUMMARY OF COMPLETED PROJECTS FOR THE PAST 2 YEARS**  
**(All completed government and private contracts)**

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***PROCUREMENT OF CONSULTING SERVICES***  
***FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT***  
***(2023 STAKEHOLDER SATISFACTION STUDY)***

List similar projects completed in the past two (2) years. This shall include projects awarded from **13 October 2021** and completed on or before the deadline of submission of technical proposals.

No. <sup>1</sup>	Name & Location of Consulting Services	Description of Consulting Services	Client	Type of Consulting Service	Contract Amount <sup>2</sup>	Date of Contract Award	Contract Period <sup>3</sup>		Proof of Undertaking <sup>4</sup>
							Start of Contract (mm/dd/yy)	Contract Completion (mm/dd/yy)	

Certified by:

**[Signature over printed name of Authorized Representative of the Firm/JV/Consortium (in case of JV/Consortium)]**

[Title]

[Date]

<sup>1</sup> In Philippine Peso.

<sup>2</sup> State the start and completion dates of the contract.

<sup>3</sup> Certificate of Completion or Certificate of Acceptance or valid proof of final payment issued by the client should be submitted as supporting documents of completed consulting services.

**TPF 3. SUMMARY OF CURRICULUM VITAE**

***PROCUREMENT OF CONSULTING SERVICES  
FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

No.	Name of Key Staff	Nominated Position	Profession	Highest Educational Attainment <sup>1</sup>	No. of Trainings Relevant to Profession <sup>2</sup>		Overall Work Experience <sup>3</sup>	Number of Undertakings Related to Client Satisfaction Measurement
					Local	Foreign		
1		Overall Project Manager						
2		Research Executive/ Analyst						
3		Data Processing Manager						
4		Lead Statistician						

Certified by:

**[Signature over printed name of Authorized Signatory of the Firm/JV/Consortium (in case of JV/Consortium)]**

[Title]

[Date]

<sup>1</sup> Provide proof of highest educational attainment

<sup>2</sup> Provide proof of trainings undertaken

<sup>3</sup> State number of years of relevant experience

<sup>4</sup> List down services undertaken which are related to evaluative research, survey, stakeholder satisfaction/relations studies, etc)





**TPF 4A. CURRICULUM VITAE (CV) FOR  
PROPOSED PROFESSIONAL STAFF**

***PROCUREMENT OF CONSULTING SERVICES  
FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

Proposed Position: **Overall Project Manager** \_\_\_\_\_

Name of Firm/Entity/JV/Consortium: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Profession: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Nationality: \_\_\_\_\_

Years with Firm/Entity: \_\_\_\_\_ years, from [mm/dd/yy] to [mm/dd/yy]

Current Position in the Firm: \_\_\_\_\_

Membership in Professional Societies: \_\_\_\_\_

Detailed Tasks Assigned: \_\_\_\_\_

**Education:**

*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]*

College/University	Degree/Title Obtained	Inclusive Dates	
		From (MM/DD/YY)	To (MM/DD/YY)

Attach the Applicable Supporting Documents: \_\_\_\_\_

\* Complete the details of the inclusive dates (month, day, and year)

**Trainings/Seminars**

*[Summarize the relevant trainings, seminars and workshops undertaken for the past eight (8 years), including those conducted by the nominated key staff, using the matrix below]*

Title/Description	Conducted by	Inclusive Dates*		No. of Hour/s	Venue	Involvement <i>(Such as participant, speaker or trainer)</i>
		From (MM/DD/YY)	To (MM/DD/YY)			
<b>Trainings relevant to the nominated position</b>						
(latest/most recent)						
(previous)						

Attach the Applicable Supporting Documents: \_\_\_\_\_

\* Complete the details of the inclusive dates (month, day, and year)

### Memberships in Professional Societies

[Give an outline of memberships in professional societies using the matrix below]

Name of Professional Societies/Organization/Affiliation	Date of Conferment/Registration (MM/DD/YY)	License/Professional/Membership Number	Validity Date (MM/DD/YY)

\* Complete the details of the inclusive dates (month, day, and year)

### Consulting Services Undertaken/Completed

[Provide outline of services undertaken/list of completed projects handled from 13 October 2021 until the deadline of submission of technical proposals using the matrix below]

Title/ Description	Type of Consulting Services/Contract (e.g evaluative research, survey, stakeholder satisfaction/relations studies, etc)	Client	Position and Description of the Nature of Work/ Engagement in the consulting services (whether full-time, part-time, principal/key team member; consultant, subcontractor; support staff, etc.)	Start Date (MM/DD/YY)	Completion Date (MM/DD/YY)
<b>Other types of consulting service/contract</b> (please specify)					
(latest/most recent)					
(previous)					

\* Rank from previous to latest/most recent service

\* Complete the details of the inclusive dates (month, day, and year)

### On-Going Services

[Provide outline of on-going consulting services using the matrix below]

Title/Description	Client	Consulting Services Contract Amount	Position	Start Date (MM/DD/YY)	End Date (MM/DD/YY)
(latest/most recent)					
(previous)					
Attach supporting documents such as NOA, NTP, signed contract, bidding documents or etc.					

\* Rank from previous to latest/most recent on-going project

\* Complete the details of the inclusive dates (month, day, and year)

### Languages

[Using the format below, indicate proficiency of languages familiar with proficiency whether excellent, good, fair, or poor in speaking, reading, and writing]

Language	Proficiency		
	Speaking	Reading	Writing

### Employment Record:

[Starting with the present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations]

of projects. For experience in the last two (2) years, also give types of activities performed and client references, where appropriate. Use about two pages.]

Inclusive Dates of Employment		Name of Employing Organization	Office Address of the Employer/ Employing Organization	Position Held <i>(whether full-time, part-time, principal/key team member, consultant, sub-contractor, support staff, etc.)</i>	Location of Projects	Relevant Work Experience/ Types of Activities Performed
From (MM/DD/YY)	To (MM/DD/YY)					
(latest/most recent)						
(previous)						

\* Rank from previous to latest/most recent employment

\* Complete the details of the inclusive dates (month, day, and year)

### Certification:

I, **[full name of proposed professional staff]**, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

### Commitment:

I also commit to work for the Consulting Services for the project in accordance with the time schedule as indicated in the contract once the firm is awarded the Consulting Services for the project.

\_\_\_\_\_  
Date: \_\_\_\_\_  
[Signature over printed name of nominated key staff] Day/Month/Year

\_\_\_\_\_  
Date: \_\_\_\_\_  
[Signature over printed name of authorized representative of the firm/  
entity/Joint Venture/Consortium in case of JV/Consortium)] Day/Month/Year

**SUBSCRIBED AND SWORN** to before me this \_\_\_ day of [month] [year] at [place of execution], Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her [insert type of government identification card used], with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_\_ day of [month] [year].

### NAME OF NOTARY PUBLIC

Serial No. of Commission \_\_\_\_\_  
Notary Public for \_\_\_\_\_ until \_\_\_\_\_  
Roll of Attorneys No. \_\_\_\_\_  
PTR No. \_\_, [date issued], [place issued]  
IBP No. \_\_, [date issued], [place issued]  
Doc. No. \_\_\_\_  
Page No. \_\_\_\_  
Book No. \_\_\_\_  
Series of 2023

**TPF 4B. CURRICULUM VITAE (CV) FOR  
PROPOSED PROFESSIONAL STAFF**

***PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

Proposed Position: Research Executive/Analyst

Name of Firm/Entity/JV/Consortium: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Profession: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Nationality: \_\_\_\_\_

Years with Firm/Entity: \_\_\_\_\_ years, from [mm/dd/yy] to [mm/dd/yy]

Current Position in the Firm: \_\_\_\_\_

Membership in Professional Societies: \_\_\_\_\_

Detailed Tasks Assigned: \_\_\_\_\_

**Education:**

*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]*

College/University	Degree/Title Obtained	Inclusive Dates	
		From (MM/DD/YY)	To (MM/DD/YY)

Attach the Applicable Supporting Documents: \_\_\_\_\_

\* Complete the details of the inclusive dates (month, day, and year)

**Trainings/Seminars**

*[Summarize the relevant trainings, seminars and workshops undertaken for the past eight (8 years), including those conducted by the nominated key staff, using the matrix below]*

Title/Description	Conducted by	Inclusive Dates*		No. of Hour/s	Venue	Involvement <i>(Such as participant, speaker or trainer)</i>
		From (MM/DD/YY)	To (MM/DD/YY)			
<b>Trainings relevant to the nominated position</b>						
(latest/most recent)						
(previous)						

Attach the Applicable Supporting Documents: \_\_\_\_\_

\* Complete the details of the inclusive dates (month, day, and year)

**Memberships in Professional Societies**

[Give an outline of memberships in professional societies using the matrix below]

Name of Professional Societies/Organization/Affiliation	Date of Conferment/Registration (MM/DD/YY)	License/Professional/Membership Number	Validity Date (MM/DD/YY)

\* Complete the details of the inclusive dates (month, day, and year)

### Consulting Services Undertaken/Completed

[Provide outline of services undertaken/list of completed projects handled from 13 October 2021 until the deadline of submission of technical proposals using the matrix below]

Title/ Description	Type of Consulting Services/Contract <i>(e.g evaluative research, survey, stakeholder satisfaction/relations studies, etc)</i>	Client	Position and Description of the Nature of Work/ Engagement in the consulting services <i>(whether full-time, part-time, principal/key team member, consultant, subcontractor, support staff, etc.)</i>	Start Date (MM/DD/YY)	Completion Date (MM/DD/YY)
<b>Other types of consulting service/contract</b> (please specify)					
(latest/most recent)					
(previous)					

\* Rank from previous to latest/most recent service

\* Complete the details of the inclusive dates (month, day, and year)

### On-Going Services

[Provide outline of on-going consulting services using the matrix below]

Title/Description	Client	Consulting Services Contract Amount	Position	Start Date (MM/DD/YY)	End Date (MM/DD/YY)
(latest/most recent)					
(previous)					
Attach supporting documents such as NOA, NTP, signed contract, bidding documents or etc.					

\* Rank from previous to latest/most recent on-going project

\* Complete the details of the inclusive dates (month, day, and year)

### Languages

[Using the format below, indicate proficiency of languages familiar with proficiency whether excellent, good, fair, or poor in speaking, reading, and writing]

Language	Proficiency		
	Speaking	Reading	Writing

**Employment Record:**

[Starting with the present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in the last two (2) years, also give types of activities performed and client references, where appropriate. Use about two pages.]

Inclusive Dates of Employment		Name of Employing Organization	Office Address of the Employer/ Employing Organization	Position Held <i>(whether full-time, part-time, principal/key team member, consultant, sub-contractor, support staff, etc.)</i>	Location of Projects	Relevant Work Experience/ Types of Activities Performed
From (MM/DD/YY)	To (MM/DD/YY)					
(latest/most recent)						
(previous)						

\* Rank from previous to latest/most recent employment

\* Complete the details of the inclusive dates (month, day, and year)

**Certification:**

I, **[full name of proposed professional staff]**, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

**Commitment:**

I also commit to work for the Consulting Services for the project in accordance with the time schedule as indicated in the contract once the firm is awarded the Consulting Services for the project.

\_\_\_\_\_ Date: \_\_\_\_\_  
**[Signature over printed name of nominated key staff]** **Day/Month/Year**

\_\_\_\_\_ Date: \_\_\_\_\_  
**[Signature over printed name of authorized representative of the firm/  
 entity/Joint Venture/Consortium in case of JV/Consortium)]** **Day/Month/Year**

**SUBSCRIBED AND SWORN** to before me this \_\_\_ day of *[month]* *[year]* at *[place of execution]*, Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her *[insert type of government identification card used]*, with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_\_ day of *[month]* *[year]*.

**NAME OF NOTARY PUBLIC**

**Serial No. of Commission** \_\_\_\_\_  
**Notary Public for** \_\_\_\_\_ **until** \_\_\_\_\_  
**Roll of Attorneys No.** \_\_\_\_\_  
**PTR No.** \_\_, *[date issued]*, *[place issued]*  
**IBP No.** \_\_, *[date issued]*, *[place issued]*  
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**Series of 2023**

**TPF 4C. CURRICULUM VITAE (CV) FOR  
PROPOSED PROFESSIONAL STAFF**

***PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

Proposed Position: **Data Processing Manager**

Name of Firm/Entity/JV/Consortium: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Profession: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Nationality: \_\_\_\_\_

Years with Firm/Entity: \_\_\_\_\_ years, from [mm/dd/yy] to [mm/dd/yy]

Current Position in the Firm: \_\_\_\_\_

Membership in Professional Societies: \_\_\_\_\_

Detailed Tasks Assigned: \_\_\_\_\_

**Education:**

*[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]*

College/University	Degree/Title Obtained	Inclusive Dates	
		From (MM/DD/YY)	To (MM/DD/YY)

Attach the Applicable Supporting Documents: \_\_\_\_\_

\* Complete the details of the inclusive dates (month, day, and year)

**Trainings/Seminars**

*[Summarize the relevant trainings, seminars and workshops undertaken for **the past eight (8 years)**, including those conducted by the nominated key staff, using the matrix below]*

Title/Description	Conducted by	Inclusive Dates*		No. of Hour/s	Venue	Involvement <i>(Such as participant, speaker or trainer)</i>
		From (MM/DD/YY)	To (MM/DD/YY)			
<b>Trainings relevant to the nominated position</b>						
(latest/most recent)						
(previous)						

Attach the Applicable Supporting Documents: \_\_\_\_\_

\* Complete the details of the inclusive dates (month, day, and year)

### Memberships in Professional Societies

[Give an outline of memberships in professional societies using the matrix below]

Name of Professional Societies/Organization/Affiliation	Date of Conferment/Registration (MM/DD/YY)	License/Professional/Membership Number	Validity Date (MM/DD/YY)

\* Complete the details of the inclusive dates (month, day, and year)

### Consulting Services Undertaken/Completed

[Provide outline of services undertaken/list of completed projects handled from 13 October 2021 until the deadline of submission of technical proposals using the matrix below]

Title/ Description	Type of Consulting Services/Contract <i>(e.g. evaluative research, survey, stakeholder satisfaction/relations studies, etc)</i>	Client	Position and Description of the Nature of Work/ Engagement in the consulting services <i>(whether full-time, part-time, principal/key team member, consultant, subcontractor, support staff, etc.)</i>	Start Date (MM/DD/YY)	Completion Date (MM/DD/YY)

Other types of consulting service/contract (please specify)

(latest/most recent)					
(previous)					

\* Rank from previous to latest/most recent service

\* Complete the details of the inclusive dates (month, day, and year)

### On-Going Services

[Provide outline of on-going consulting services using the matrix below]

Title/Description	Client	Consulting Services Contract Amount	Position	Start Date (MM/DD/YY)	End Date (MM/DD/YY)
(latest/most recent)					
(previous)					

Attach supporting documents such as NOA, NTP, signed contract, bidding documents or etc.

\* Rank from previous to latest/most recent on-going project

\* Complete the details of the inclusive dates (month, day, and year)

### Languages

[Using the format below, indicate proficiency of languages familiar with proficiency whether excellent, good, fair, or poor in speaking, reading, and writing]

Language	Proficiency		
	Speaking	Reading	Writing



**Employment Record:**

[Starting with the present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in the last two (2) years, also give types of activities performed and client references, where appropriate. Use about two pages.]

Inclusive Dates of Employment		Name of Employing Organization	Office Address of the Employer/ Employing Organization	Position Held <i>(whether full-time, part-time, principal/key team member, consultant, sub-contractor, support staff, etc.)</i>	Location of Projects	Relevant Work Experience/ Types of Activities Performed
From (MM/DD/YY)	To (MM/DD/YY)					
(latest/most recent)						
(previous)						

\* Rank from previous to latest/most recent employment

\* Complete the details of the inclusive dates (month, day, and year)

**Certification:**

I, **[full name of proposed professional staff]**, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

**Commitment:**

I also commit to work for the Consulting Services for the project in accordance with the time schedule as indicated in the contract once the firm is awarded the Consulting Services for the project.

\_\_\_\_\_  
Date: \_\_\_\_\_  
**[Signature over printed name of nominated key staff]** **Day/Month/Year**

\_\_\_\_\_  
Date: \_\_\_\_\_  
**[Signature over printed name of authorized representative of the firm/  
entity/Joint Venture/Consortium in case of JV/Consortium)]** **Day/Month/Year**

**SUBSCRIBED AND SWORN** to before me this \_\_\_ day of [month] [year] at [place of execution], Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her [insert type of government identification card used], with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_\_ day of [month] [year].

**NAME OF NOTARY PUBLIC**

Serial No. of Commission \_\_\_\_\_  
Notary Public for \_\_\_\_\_ until \_\_\_\_\_  
Roll of Attorneys No. \_\_\_\_\_  
PTR No. \_\_, [date issued], [place issued]  
IBP No. \_\_, [date issued], [place issued]  
Doc. No. \_\_\_\_  
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Book No. \_\_\_\_

Series of 2023

**TPF 4D. CURRICULUM VITAE (CV) FOR  
PROPOSED PROFESSIONAL STAFF**

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***PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

Proposed Position: Lead Statistician

Name of Firm/Entity/JV/Consortium: \_\_\_\_\_

Name of Staff: \_\_\_\_\_

Profession: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Nationality: \_\_\_\_\_

Years with Firm/Entity: \_\_\_\_\_ years, from [mm/dd/yy] to [mm/dd/yy]

Current Position in the Firm: \_\_\_\_\_

Membership in Professional Societies: \_\_\_\_\_

Detailed Tasks Assigned: \_\_\_\_\_

**Education:**

[Summarize college/university and other specialized education of staff members, giving names of schools, dates attended, and degrees obtained. Use about one quarter of a page.]

College/University	Degree/Title Obtained	Inclusive Dates	
		From (MM/DD/YY)	To (MM/DD/YY)

Attach the Applicable Supporting Documents:

\* Complete the details of the inclusive dates (month, day, and year)

**Trainings/Seminars**

[Summarize the relevant trainings, seminars and workshops undertaken for the past eight (8 years), including those conducted by the nominated key staff, using the matrix below]

Title/Description	Conducted by	Inclusive Dates*		No. of Hour/s	Venue	Involvement (Such as participant, speaker or trainer)
		From (MM/DD/YY)	To (MM/DD/YY)			
<b>Trainings relevant to the nominated position</b>						
(latest/most recent)						
(previous)						

Attach the Applicable Supporting Documents:

\* Complete the details of the inclusive dates (month, day, and year)

### Memberships in Professional Societies

[Give an outline of memberships in professional societies using the matrix below]

Name of Professional Societies/Organization/Affiliation	Date of Conferment/Registration (MM/DD/YY)	License/Professional/Membership Number	Validity Date (MM/DD/YY)

\* Complete the details of the inclusive dates (month, day, and year)

### Consulting Services Undertaken/Completed

[Provide outline of services undertaken/list of completed projects handled from 13 October 2021 until the deadline of submission of technical proposals using the matrix below]

Title/ Description	Type of Consulting Services/Contract <i>(e.g. evaluative research, survey, stakeholder satisfaction/relations studies, etc)</i>	Client	Position and Description of the Nature of Work/ Engagement in the consulting services <i>(whether full-time, part-time, principal/key team member, consultant, subcontractor, support staff, etc.)</i>	Start Date (MM/DD/YY)	Completion Date (MM/DD/YY)

Other types of consulting service/contract (please specify)

(latest/most recent)					
(previous)					

\* Rank from previous to latest/most recent service

\* Complete the details of the inclusive dates (month, day, and year)

### On-Going Services

[Provide outline of on-going consulting services using the matrix below]

Title/Description	Client	Consulting Services Contract Amount	Position	Start Date (MM/DD/YY)	End Date (MM/DD/YY)
(latest/most recent)					
(previous)					

Attach supporting documents such as NOA, NTP, signed contract, bidding documents or etc.

\* Rank from previous to latest/most recent on-going project

\* Complete the details of the inclusive dates (month, day, and year)

### Languages

[Using the format below, indicate proficiency of languages familiar with proficiency whether excellent, good, fair, or poor in speaking, reading, and writing]

Language	Proficiency		
	Speaking	Reading	Writing

**Employment Record:**

[Starting with the present position, list in reverse order every employment held. List all positions held by staff member since graduation, giving dates, names of employing organizations, titles of positions held, and locations of projects. For experience in the last two (2) years, also give types of activities performed and client references, where appropriate. Use about two pages.]

Inclusive Dates of Employment		Name of Employing Organization	Office Address of the Employer/ Employing Organization	Position Held <i>(whether full-time, part-time, principal/key team member, consultant, sub-contractor, support staff, etc.)</i>	Location of Projects	Relevant Work Experience/ Types of Activities Performed
From (MM/DD/YY)	To (MM/DD/YY)					
(latest/most recent)						
(previous)						

\* Rank from previous to latest/most recent employment

\* Complete the details of the inclusive dates (month, day, and year)

**Certification:**

I, **[full name of proposed professional staff]**, certify that to the best of my knowledge and belief, these data correctly describe me, my qualifications, and my experience.

**Commitment:**

I also commit to work for the Consulting Services for the project in accordance with the time schedule as indicated in the contract once the firm is awarded the Consulting Services for the project.

\_\_\_\_\_ Date: \_\_\_\_\_  
**[Signature over printed name of nominated key staff]** **Day/Month/Year**

\_\_\_\_\_ Date: \_\_\_\_\_  
**[Signature over printed name of authorized representative of the firm/  
 entity/Joint Venture/Consortium in case of JV/Consortium)]** **Day/Month/Year**

**SUBSCRIBED AND SWORN** to before me this \_\_\_ day of *[month]* *[year]* at *[place of execution]*, Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her *[insert type of government identification card used]*, with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_\_ day of *[month]* *[year]*.

**NAME OF NOTARY PUBLIC**

**Serial No. of Commission** \_\_\_\_\_  
**Notary Public for** \_\_\_\_\_ **until** \_\_\_\_\_  
**Roll of Attorneys No.** \_\_\_\_\_  
**PTR No.** \_\_, *[date issued]*, *[place issued]*  
**IBP No.** \_\_, *[date issued]*, *[place issued]*  
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**Series of 2023**

**TPF 5. FORMAT OF CURRICULUM VITAE (CV) OF THE FIRM/ENTITY**

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***PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

Name of Firm/Entity: \_\_\_\_\_

Address: \_\_\_\_\_

No. of Years of Operation: \_\_\_\_\_ years, from [mm/dd/yy] to [mm/dd/yy]

Years of Professional Experience: \_\_\_\_\_ years, from [mm/dd/yy] to [mm/dd/yy]

Membership in Professional Organizations:

<b>Year</b>	<b>Professional Society</b>

**Certification**

I, the undersigned, certify that to the best of my knowledge and belief, these data correctly describe the firm/entity, its qualification and experiences.

**[Signature over Printed Name of Authorized Signatory of the Firm/Entity/  
Joint Venture or Consortium (in case of JV/ Consortium)]**

Date: \_\_\_\_\_

**TPF 6. CERTIFICATE OF AVAILABILITY OF KEY PERSONNEL**

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***PROCUREMENT OF CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)***

[Date]

To: **The Bids and Awards Committee for Consulting Services  
Bases Conversion and Development Authority**

Dear Ladies/Gentlemen:

In compliance with the requirements of BCDA Bids and Awards Committee for Consulting Services for the **Procurement of Consulting Services for the BCDA 2023 Client Satisfaction Measurement (CSM)**, (“Consulting Services”), we certify that we understand and agree with all the manning requirements set upon by Section 5 of the Terms of Reference for this consulting service.

We further certify that the following nominated Key Personnel shall be fully engaged, on-call and committed to the duration of their engagement with this project:

1. Overall Project Manager
2. Research Executive/Analyst
3. Data Processing Manager
4. Lead Statistician

Very truly yours,

**[Signature over printed name of Authorized Signatory of the Firm/Entity/Joint Venture or Consortium (in case of Joint Venture/Consortium)]**

[Title]

[Name of Bidder]

Date: \_\_\_\_\_

## TPF 7. CSM PLAN OF APPROACH AND METHODOLOGY

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### ***PROCUREMENT OF CONSULTING SERVICES FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT (2023 STAKEHOLDER SATISFACTION STUDY)***

- I. Research Context (Understanding of the Requirements of the Project)
- II. Research Team Roles (Describe roles of each of the four key personnel)
- III. Implementation of Methodology
- IV. Sampling Strategy
- V. Data Processing and Analysis
- VI. Report Preparation
- VII. Timeline

**[Signature over printed name of Authorized Signatory of the Firm/Entity/Joint Venture/Consortium (in case of JV/Consortium)]**

[Title]

Date: \_\_\_\_\_

## FPF 1. FINANCIAL PROPOSAL SUBMISSION FORM

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### ***PROCUREMENT OF CONSULTING SERVICES FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT (2023 STAKEHOLDER SATISFACTION STUDY)***

**[Date]**

Bases Conversion and Development Authority  
2/F Bonifacio Technology Center  
31st St., corner 2nd Avenue, Bonifacio Global City.

Ladies/Gentlemen:

We, the undersigned, offer to provide the consulting services for **Procurement of Consulting Services for the 2023 BCDA Client Satisfaction Measurement (CSM)** in accordance with your Bidding Documents dated \_\_\_\_\_ and our Bid (Technical and Financial Proposals). Our attached Financial Proposal is for the sum of **[amount in words and figures]**. This amount is exclusive of the local taxes, which we have estimated at **[amount(s) in words and figures]**.

Our Financial Proposal shall be binding upon us subject to the modifications resulting from Contract negotiations, up to expiration of the bid validity period, *i.e.*, 120 calendar days from the opening of the bids.

In accordance with GCC Clause 51, we acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our Bid irrespective of whether we enter into a contract with the Procuring Entity as a result of this Bid.

We confirm that we have read, understood and accept the contents of the Instructions to Bidders (ITB), the Bid Data Sheet (BDS), General Conditions of Contract (GCC), Special Conditions of Contract (SCC), Terms of Reference (TOR), the provisions relating to the eligibility of Consultant and the applicable guidelines for the procurement rules of the Funding Source, any and all Bid bulletins issued and other attachments and inclusions included in the Bidding Documents sent to us.

We understand you are not bound to accept any Bid you receive.

We remain,

Yours sincerely,

**Signature of the Authorized Representative of the Firm/JV/Consortium:**

Name and Title of Signatory:

Name of Firm/entity:

Address:



**SUBSCRIBED AND SWORN** to before me this \_\_\_ day of *[month]* *[year]* at *[place of execution]*, Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her *[insert type of government identification card used]*, with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_\_ day of *[month]* *[year]*.

**NAME OF NOTARY PUBLIC**

**Serial No. of Commission** \_\_\_\_\_  
**Notary Public for** \_\_\_\_\_ **until** \_\_\_\_\_  
**Roll of Attorneys No.** \_\_\_\_\_  
**PTR No.** \_\_, *[date issued]*, *[place issued]*  
**IBP No.** \_\_, *[date issued]*, *[place issued]*

**Doc. No.** \_\_\_\_  
**Page No.** \_\_\_\_  
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**Series of 2023**

## Omnibus Sworn Statement (Revised)

*[shall be submitted with the Bid]*

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### **PROCUREMENT OF CONSULTING SERVICES FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT (2023 STAKEHOLDER SATISFACTION STUDY)**

REPUBLIC OF THE PHILIPPINES )

CITY/MUNICIPALITY OF \_\_\_\_\_ ) S.S.

#### **AFFIDAVIT**

I, [Name of Affiant], of legal age, [Civil Status], [Nationality], and residing at [Address of Affiant], after having been duly sworn in accordance with law, do hereby depose and state that:

1. *[Select one, delete the other:]*

*[If a sole proprietorship:]* I am the sole proprietor or authorized representative of [Name of Bidder] with office address at [address of Bidder];

*[If a partnership, corporation, cooperative, or joint venture:]* I am the duly authorized and designated representative of [Name of Bidder] with office address at [address of Bidder];

2. *[Select one, delete the other:]*

*[If a sole proprietorship:]* As the owner and sole proprietor, or authorized representative of [Name of Bidder], I have full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for the Procurement of **Consulting Services for the 2023 BCDA Client Satisfaction Measurement (CSM)**, as shown in the attached duly notarized Special Power of Attorney;

*[If a partnership, corporation, cooperative, or joint venture:]* I am granted full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for the **Procurement of Consulting Services for the BCDA 2023 Client Satisfaction Measurement (CSM)**, as shown in the attached [state title of attached document showing proof of authorization (e.g., duly notarized Secretary's Certificate, Board/Partnership Resolution, or Special Power of Attorney, whichever is applicable)];

3. [Name of Bidder] is not "blacklisted" or barred from bidding by the Government of the Philippines or any of its agencies, offices, corporations, or Local Government Units, foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board, **by itself or by relation, membership, association, affiliation, or controlling interest with another blacklisted person or entity as defined and provided for in the Uniform Guidelines on Blacklisting.**

4. Each of the documents submitted in satisfaction of the bidding requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct. We acknowledge that any mis-representation or submission of fake or tampered documents by the [Name of Consultant], its partner/s (in case of Joint Venture or partnership) or sub-contractor, or any of the key personnel nominated by the Consultant shall automatically result in disqualification of the Consultant from the project and shall be grounds for blacklisting pursuant to Section 4.1 of the Appendix 17 of the Revised IRR of RA9184.

5. [Name of Bidder] is authorizing the Head of the Procuring Entity or its duly authorized representative(s) to verify all the documents submitted;

6. *[Select one, delete the rest:]*

*[If a sole proprietorship:]* The owner or sole proprietor is not related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

*[If a partnership or cooperative:]* None of the officers and members of [Name of Bidder] is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

*[If a corporation or joint venture:]* None of the officers, directors, and controlling stockholders of [Name of Bidder] is related to the Head of the Procuring Entity, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

7. [Name of Bidder] complies with existing labor laws and standards; and

8. [Name of Bidder] is aware of and has undertaken the responsibilities as a Bidder in compliance with the Philippine Bidding Documents, which includes:

- a. Carefully examining all of the Bidding Documents;
- b. Acknowledging all conditions, local or otherwise, affecting the implementation of the Contract;
- c. Making an estimate of the facilities available and needed for the contract to be bid, if any; and
- d. Inquiring or securing Supplemental/Bid Bulletin(s) issued for the **Consulting Services for the BCDA 2023 Client Satisfaction Measurement (CSM)**.

9. [Name of Bidder] did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel or representative of the government in relation to any procurement project or activity.

10. **In case advance payment was made or given, failure to perform or deliver any of the obligations and undertakings in the contract shall be sufficient grounds to constitute**

**criminal liability for Swindling (Estafa) or the commission of fraud with unfaithfulness or abuse of confidence through misappropriating or converting any payment received by a person or entity under an obligation involving the duty to deliver certain goods or services, to the prejudice of the public and the government of the Philippines pursuant to Article 315 of Act No. 3815 s. 1930, as amended, or the Revised Penal Code.**

IN WITNESS WHEREOF, I have hereunto set my hand this \_\_ day of \_\_, 2023 at \_\_\_\_\_, Philippines.

**[Insert NAME OF BIDDER OR ITS AUTHORIZED REPRESENTATIVE]**

**[Insert signatory's legal capacity]**

Affiant

SUBSCRIBED AND SWORN to before me this \_\_ day of [month] [year] at [place of execution], Philippines. Affiant/s is/are personally known to me and was/were identified by me through competent evidence of identity as defined in the 2004 Rules on Notarial Practice (A.M. No. 02-8-13-SC). Affiant/s exhibited to me his/her [insert type of government identification card used], with his/her photograph and signature appearing thereon, with no. \_\_\_\_\_.

Witness my hand and seal this \_\_ day of [month] [year].

**NAME OF NOTARY PUBLIC**

**Serial No. of Commission \_\_\_\_\_**

**Notary Public for \_\_\_\_\_ until \_\_\_\_\_**

**Roll of Attorneys No. \_\_\_\_\_**

**PTR No. \_\_, [date issued], [place issued]**

**IBP No. \_\_, [date issued], [place issued]**

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**Series of 2023**

**SECRETARY'S CERTIFICATE FORMAT**  
**(where applicable)**

Republic of the Philippines )  
Taguig City ) SS.

I, \_\_\_\_\_, of legal age, being the Corporate Secretary of the \_\_\_\_\_, with office address at the \_\_\_\_\_, do hereby certify that on the occasion of the Board Meeting held on \_\_\_\_\_, with a quorum being present, the Board of Directors, upon motion duly seconded, unanimously approved the following resolution:

**A. Resolution No. \_\_\_\_\_**

Resolved, as it is hereby resolved, that the corporation shall enter into a Joint Venture with \_\_\_\_\_, the purpose of which is to participate in the **Procurement of Consulting Services for the BCDA 2023 Client Satisfaction Measurement (CSM)**, being conducted by Bases Conversion and Development Authority.

Resolved, further, that for this purpose, \_\_\_\_\_ hereby authorizes \_\_\_\_\_, \_\_\_\_\_ to represent the corporation on the said Joint Venture and to sign on all agreements in relation thereto, cause the submission of documents in support thereof, and to sign for and in behalf of the Corporation, such as authority/authorities/Power of Attorney in favor of whoever may be designated by the joint venture as the latter's official representative/Attorney-in-fact for purposes of the said bidding.

IN WITNESS WHEREOF, I have hereunto affixed my signature this \_\_\_\_\_

\_\_\_\_\_  
**Corporate Secretary**

SUBSCRIBED AND SWORN to before me this \_\_\_\_\_ at \_\_\_\_\_, Philippines, by \_\_\_\_\_ who exhibited to me her \_\_\_\_\_, issued at the \_\_\_\_\_ on \_\_\_\_\_ and valid until \_\_\_\_\_.

Doc. No. \_\_\_\_\_  
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Book No. \_\_\_\_\_  
Series of 2023

***SPECIAL POWER OF ATTORNEY FORMAT***  
**(where applicable)**

I, \_\_\_\_\_, of legal age, (civil status), (citizenship), and residing \_\_\_\_\_ after having duly sworn in accordance with law, do hereby depose and state that:

1. I am the sole proprietor/owner/authorized representative of firm/entity/partnership of \_\_\_\_\_, with office address at \_\_\_\_\_, having full power and authority to appoint a representative who will sign the joint venture agreement with \_\_\_\_\_, the purpose of which is to participate in the ***Procurement of Consulting Services for the 2023 Client Satisfaction Measurement*** being conducted by the Bases Conversion and Development Authority.
2. I hereby make, constitute and appoint \_\_\_\_\_, as the true and lawful attorney, for it and its name, place and stead, to represent \_\_\_\_\_ on the said Joint Venture and to sign on all agreements in relation thereto, cause the submission of documents in support thereof, and to sign for and in behalf of \_\_\_\_\_, such as authority/authorities/Power of Attorney in favor of whoever may be designated by the joint venture as the latter's official representative/Attorney-in-fact for purposes of the said bidding.

IN WITNESS WHEREOF, I have hereunto affixed my signature this \_\_\_\_\_

**Name and signature of Owner/Authorized Representative  
of Owner/Firm/Entity/Partnership**

**Name and signature of  
Authorized Representative**

SUBSCRIBED AND SWORN to before me this \_\_\_\_\_ at \_\_\_\_\_, Philippines, by \_\_\_\_\_ who exhibited to me her \_\_\_\_\_, issued at the \_\_\_\_\_ on \_\_\_\_\_ and valid until \_\_\_\_\_.

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Series of 2023

## BASES CONVERSION AND DEVELOPMENT AUTHORITY

### *PROCUREMENT OF CONSULTING SERVICES FOR THE BCDA 2023 CLIENT SATISFACTION MEASUREMENT (2023 STAKEHOLDER SATISFACTION STUDY)*

#### CHECKLIST AND TABBING OF BIDDING REQUIREMENTS

Tab No.	Form No.	Description	Duly Signed by the Authorized Representative	Duly Notarized
1	EF 1	Eligibility Documents Submission Form	<input type="checkbox"/>	<input type="checkbox"/>
2	-	<ul style="list-style-type: none"> <li>- PhilGEPS Certification of Registration under Platinum Membership or Red Membership (all pages) pursuant to Section 8.5.2 of the 2016 revised IRR.</li> <li>- Mayor's/Business Permit or recently expired Mayor's permit, the official receipt for renewal within the period prescribed by the concerned local government unit and the recently expired Mayor's permit shall be submitted, in case of PhilGEPS Certification of Registration under Red Membership is submitted.</li> <li>- Latest Income/Business Tax Return, in case of PhilGEPS Certification of Registration under Red Membership is submitted.</li> </ul>		
3	TPF 1	Statement of All Completed Government and Private Contracts, For The Past 2 Years	<input type="checkbox"/>	
4	TPF 2	Summary of Completed Projects for the Past 2 Years (All completed government and private contracts)	<input type="checkbox"/>	
5	TPF 3	Summary of Curriculum Vitae	<input type="checkbox"/>	<input type="checkbox"/>
6	TPF4	Curriculum Vitae (CV) for Proposed Professional Staff		
6.1	TPF 4A	Over-all Project Manager	<input type="checkbox"/>	<input type="checkbox"/>
6.2	TPF 4B	Research Executive/Analyst	<input type="checkbox"/>	<input type="checkbox"/>
	TPF 4C	Data Processing Manager		
6.3	TPF 4D	Lead Statistician	<input type="checkbox"/>	<input type="checkbox"/>
7	TPF 5	Format of Curriculum Vitae (CV) of the Firm/Entity	<input type="checkbox"/>	
8	TPF 6	Certificate of Availability of Key Personnel	<input type="checkbox"/>	
9	TPF 7	Plan of Approach and Methodology	<input type="checkbox"/>	
10	FPF 1	Financial Proposal Submission Form	<input type="checkbox"/>	<input type="checkbox"/>
12		Omnibus Sworn Statement	<input type="checkbox"/>	<input type="checkbox"/>
13	-	<p>Class "B" Document (if the bid is a joint venture) An executed Joint Venture Agreement (JVA) between parties, for joint venture. In the absence of a JVA, duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful, shall be included in the bid.</p> <p>Failure to enter into a joint venture in the event of a contract award shall be ground for the forfeiture of the bid security. Each partner of the joint venture shall submit the PhilGEPS Certificate of Registration in accordance with Section 8.5.2 of this IRR. The</p>		

		submission of technical and financial documents by any of the joint venture partners constitutes compliance.		
		Secretary's Certificate (WHERE APPLICABLE)		
		Special Power of Attorney (WHERE APPLICABLE)		

*Note: BCDA shall not assume any responsibility regarding erroneous interpretations or conclusions by the Bidder out of the data furnished by BCDA in relation to this bidding. The Bidder shall take the responsibility to ensure the completeness of its submission after taking the steps to carefully examine all the Bidding Documents and its amendments.*

Republic of the Philippines  
Office of the President





**CONSULTING SERVICES  
FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT  
(2023 STAKEHOLDER SATISFACTION STUDY)  
Terms of Reference (TOR)**

**I. RATIONALE**

The Bases Conversion and Development Authority (BCDA) is an instrumentality of the government vested with corporate powers under Republic Act (RA) No. 7227, as amended, which is mandated to transform and develop former military bases and properties into premier centers of economic growth. BCDA is committed to fulfill its mandate to its stakeholders and beneficiaries, particularly to its major stakeholder, the Armed Forces of the Philippines (AFP).

BCDA acknowledges the importance of stakeholder satisfaction feedback as it pursues its mandate of development. By measuring stakeholders' feedback toward its programs and services, BCDA has the basis for necessitating continuous improvements in its operations and services.

Among BCDA's communication objectives is to implement a feedback mechanism among its stakeholders to enable BCDA to monitor its performance under its mandate and keep its corporate reputation and image in check.

This will be done through the conduct of the BCDA 2023 Harmonized Client Satisfaction Measurement (also known as the BCDA 2023 Stakeholder Satisfaction Study), which is a requirement of the Anti-Red Tape Authority (ARTA) and the Governance Commission for Government-Owned or -Controlled Corporations (GCG).

The Harmonized Client Satisfaction Measurement (HCSM) is a feedback mechanism required of all government agencies and instrumentalities covered under Section 20 of Republic Act No. 11032 or the Ease of Doing Business and Efficient Government Service Delivery Act of 2018 in aid of their respective process improvement efforts. The results will be reported annually to the Anti Red Tape Authority (ARTA)

In pursuit of Section 3b Rule IV of the Implementing Rules and Regulations of RA 11032, the ARTA issued ARTA Memorandum Circular No. 2022-05 or the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement.

On the other hand, RA 10149 or the GOCC Governance Act of 2011, which created the GCG, established the Performance Evaluation System (PES). The PES includes the Customer Satisfaction Survey (CSS) as one of the agencies' key performance indicators—serving as a monitoring tool to measure how GOCCs relate with their customers as this provides tangible and verifiable data on how GOCCs deliver their services.

To strengthen their mandate, the GCG adopted MC No. 2012-07 or the Code of Corporate Governance, which requires GOCCs to ensure integrity in dealing with customers; operate a highly effective and efficient organization, focused on meeting

customer objectives; and operate policies of continuous improvement, of both processes and the skills of the staff to ensure that it continues to add value to its customers' undertakings.

Last 12 April 2023, the GCG and the ARTA issued Joint Memorandum Circular No. 1 which refers to the supplemental guidelines for the implementation of the HCSM. In the circular, the GCG required the conduct of the CSS as required by the GCG-approved Performance Scorecard, while adopting the methodology described in ARTA Memorandum Circular 2022-05.

The HCSM will enable measurement and comparison of service performance of agencies for all services offered by the agency based on the ARTA-approved Citizen's Charter. Further, it intends to provide a standard framework in measuring client satisfaction across all agencies and guidance for a uniformed manner of reporting and interpretation of results.

In order to provide professional expertise on the data management and analysis requirements of the 2023 BCDA Client Satisfaction Measure Report, it is imperative that the said study be conducted and interpreted by independent third party research professionals and experts.

## **II. BACKGROUND**

The conduct of the Client Satisfaction Measurement, otherwise known as the BCDA 2023 Stakeholder Satisfaction Study, is guided by the following:

### **A. Republic Act no. 11032**

**EASE OF DOING BUSINESS AND EFFICIENT GOVERNMENT SERVICE DELIVERY ACT OF 2018**

“An Act promoting ease of doing business and efficient delivery of government services, meaning for the purpose Republic Act No. 9485, otherwise known as the Anti-Red Tape Act of 2007, and for other purposes”

According to the ARTA, “the act aims to streamline the current systems and procedures of government services. It pertains to improving the competitiveness of and ease of doing business in the Philippines. The law effectively amends Republic Act 9485 or the Anti-Red Tape Act of 2007. A strengthened version of the law, it is poised to facilitate prompt actions or resolution of all government transactions with efficiency. It applies to all government offices and agencies in the Executive Department including local government units (LGUs), government-owned or -controlled corporations, and other government instrumentalities, located in the Philippines or abroad, that provide services covering business-related and non-business transactions as defined in the IRR.

### **Section 6. Citizen's Charter.**

All government agencies including departments, bureaus, offices, instrumentalities, or government-owned and/or –controlled corporations, or LGUs shall set up their respective most current and updated service standards to be known as the Citizen's Charter in the form of information billboards which

shall be posted at the main entrance of offices or at the most conspicuous place, in their respective websites and in the form of published materials written either in English, Filipino, or in the local dialect, that detail:

"(a) A comprehensive and uniform checklist of requirements for each type of application or request;

"(b) The procedure to obtain a particular service;

"(c) The person/s responsible for each step;

"(d) The maximum time to conclude the process;

"(e) The document/s to be presented by the applicant or requesting party, if necessary;

"(f) The amount of fees, if necessary; and

"(g) The procedure for filing complaints."

**Section 3 (b), Rule IV of Implementing Rules and Regulations of RA11032**

“all agencies shall embed feedback mechanisms and client satisfaction measurement in their process improvement efforts. The agency shall report to the Anti-Red Tape Authority the results of the Client Satisfaction /survey for each service based on the guidelines issued by the Authority

**B. Republic Act No. 10149**

“GOCC GOVERNANCE ACT OF 2011”

“An act to promote financial viability and fiscal discipline in government-owned or -controlled corporations and to strengthen the role of the state in its governance and management to make them more responsive to the needs of public interest and for other purposes”

The Act maintains that the State recognizes the role of GOCCs in achieving sustainable and inclusive growth in aid of economic development. With this recognition is the need for the State to ensure that the operations of GOCCs are rationalized and monitored centrally so that assets and resources are used efficiently; that the governance of GOCCs is carried out in a transparent, professional, fully accountable manner and with competence; and that a reporting and evaluation system is enforced.

Republic Act (R.A.) No. 10149 mandates the GCG to establish a performance evaluation system (PES) which shall apply to all GOCCs in general and to the various GOCC classifications. RA 10149 mandates GCG to actively exercise the State’s ownership rights through the institutionalization of the PES.

**C. Executive Order 605, s. 2007**

“INSTITUTIONALIZING THE STRUCTURE, MECHANISMS AND STANDARDS TO IMPLEMENT THE GOVERNMENT QUALITY MANAGEMENT PROGRAM, AMENDING FOR THE PURPOSE ADMINISTRATIVE ORDER NO. 161, S. 2006”

EO 605 directs: “All departments and agencies...to adopt the ISO 9001:2008 Quality Management Systems as part of the implementation of a government-wide quality management program. The quality management

systems shall be certified for demonstrated conformity with ISO 9001:2008 and the applicable Government Quality Management Systems Standards (GQMSS), with priority to be given to frontline services.”

**D. ISO 9001:2015**

ISO 9001:2015 is the latest version of ISO 9001:2008. According to the website of the International Organization for Standardization (www.iso.org), “ISO 9001:2015 specifies requirements for a quality management system when an organization:

- a. needs to demonstrate its ability to consistently provide products and services that meet customer and applicable statutory and regulatory requirements; and
- b. aims to enhance customer satisfaction through the effective application of the system, including processes for improvement of the system and the assurance of conformity to customers and applicable statutory and regulatory requirements.”

**E. Standard Guidelines and Recommendations of the GCG:**

*GCG Memorandum Circular (M.C.) No. 2013-02 establishes the Performance Evaluation System for the GOCC Sector / Performance Evaluation System Guidebook*

The (GCG) created a Performance Evaluation System which discusses extensively on the Social Impact Perspective, which “refers to the national and community-wide impact (socio-economic) of the services delivered by the GOCC.” It further explains though that “the GOCC may or may not include a social impact perspective if its social impact cannot be differentiated from its outcome in the stakeholder perspective.”

In order to measure the stakeholders’ perspective on the effectiveness of service delivery by the GOCC, the GCG directs all GOCCs to implement customer and/or stakeholder satisfaction surveys conducted by independent third parties from the private sector.

Surveys should test the level of satisfaction in any of these areas:

Themes	Description
1. Timeliness	Rate of the delivery of services done within agreed timeframes
2. Ease of Access	Rate of understanding of services provided and how to access the service (Service delivery channels and channel preferences)

3. Staff	Rate staff in terms of: Knowledge, Understanding client needs, helpfulness and if easy to work with
4. Quality	Rate the quality of service (delivered to expectations)
5. Outcome	Rate the outcomes achieved or meeting certain requirements
6. Overall Satisfaction	On a scale of X, how satisfied are you with the service provided by the GOCC?

The Performance Evaluation System Guidebook can be accessed via:  
<https://gcg.gov.ph/files/ONzRUkhMxaipEjfn8b6.pdf>

*GCG MC No. 2012-07 or the Code of Corporate Governance*

Under this circular, GOCC Governing Boards are required to: (a) Ensure integrity and honesty in dealings with customers and operate a highly effective and efficient 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 the staff, to take best advantage of advances in all aspects of society in order to ensure that it continues to add value to its customers' businesses.

*GCG MC No. 2013-02 (Re-issued) and 2017 -02*

Under these circulars, the Performance Evaluation System is discussed. GCG made it mandatory for GOCCs to conduct an annual Customer Satisfaction Survey (CSS) as one of the performance indicators under the said Performance Evaluation System (PES). The CSS serves as one of the monitoring tools to measure how GOCCs relate with their customers as this provides tangible and verifiable data on how GOCCs deliver their services.

**F. Memorandum Circulars of the ARTA:**

*Memorandum Circular No. 2022-05 establishes the “Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement”*

The MC intends to “promote the adoption of a harmonized and standardized framework in measuring client satisfaction across all levels of the government and will ensure continuous improvement and enhancement of service promise towards a more meaningful client-centered Citizens Charter.”

The MC may be accessed via this link:  
<https://arta.gov.ph/wp-content/uploads/2022/09/MC-2022-05-GUIDELINES-ON>

-THE-IMPLEMENTATION-OF-THE-HARMONIZED-CLIENT-SATISFACTI  
ON-MEASUREMENT.pdf

*Joint Memorandum Circular No. 1, Series of 2023 establishes the Supplemental Guidelines to the ARTA Memorandum Circular No. 2022-05 or the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement Specific for GOCCs Covered by Republic Act No. 10149*

The JMC may be accessed via this link:  
<https://gcg.gov.ph/files/MJrPfViDBJyVy5Po6Jkp.pdf>

**G. Republic Act No. 9485**  
ANTI-RED TAPE ACT OF 2007

“An act to improve efficiency in the delivery of government service to the public by reducing bureaucratic red tape, preventing graft and corruption, and providing penalties therefor”

**III. BUDGET:**

The Approved Budget of the Contract (ABC) is **Six Hundred Thousand Pesos Only (Php600,000.00)**, inclusive of all applicable government taxes and fees and incidental expenses.

**IV. OBJECTIVE:**

The BCDA aims to engage the services of a Third-Party Provider that would help the organization generate tangible and verifiable data on the satisfaction level of external stakeholders for BCDA’s services—in compliance with all requirements stated on the GCG-ARTA Joint Memorandum Circular No.1, series of 2023, for the conduct of the 2023 HCSM of BCDA.

The objectives of the Consulting Services for the 2023 Client Satisfaction Measure are:

- A. To generate feedback from BCDA external stakeholders based on services identified in its Citizens Charter
- B. To enable BCDA to measure overall satisfaction of stakeholders specific to services availed based on the ARTA methodology;
- C. To enable BCDA to measure satisfaction over service quality dimensions identified by ARTA—responsiveness, reliability, access and facilities, communication, costs, integrity, assurance and outcome.
- D. To provide benchmarks and identify specific actions that BCDA can take to improve its performance and incorporate these as part of strategic planning;
- E. To help ensure continued compliance with good governance conditions prescribed by the GCG and ISO 9001 standards.

## V. SCOPE OF WORK/TECHNICAL SPECIFICATIONS AND DELIVERABLES:

The Third-Party Service Provider shall undertake within the agreed schedule all relevant and necessary activities such as, but not limited to, data encoding, data processing, validation, evaluation and interpretation of results, preparation of final reports in accordance with the GCG-ARTA *Joint Memorandum Circular No. 1, Series of 2023 or the Supplemental Guidelines to the ARTA Memorandum Circular No. 2022-05 or the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement Specific for GOCCs Covered by Republic Act No. 10149.*

The timely submission and presentation of the project to the BCDA and preparation of all other related activities to fulfill the requirements of the project shall be included. The scope of work includes the following:

- A. The CONSULTANT shall provide guidance to BCDA and ensure that sampling and data-gathering/collection methods are compliant with the ARTA-GCG Guidelines for the Conduct of the Harmonized Client Satisfaction Measurement (HCSM). The Consultant shall ensure that the minimum required number of respondents per service availed is met as validated by the Sample Size Calculator provided by the ARTA for the conduct of the HCSM. The Consultant shall ensure that response rates are also maximized based on acceptable data gathering methods;
- B. The CONSULTANT shall perform data encoding of results gathered by BCDA, anchored on the responses to the ARTA-prescribed Client Satisfaction Measurement Questionnaire;
- C. The CONSULTANT shall process all gathered data to determine the level of satisfaction of stakeholders within the prescribed period of the HCSM;
- D. The CONSULTANT shall determine the final scoring per question in the Client Satisfaction Measurement Questionnaire and the overall scoring for satisfaction guided by the prescribed ARTA methodology. This shall be presented as part of the Final HCSM Report with supporting tables and figures as prescribed. The Consultant shall determine in the Report the overall satisfaction/dissatisfaction rating, the reasons for the satisfaction/dissatisfaction rating and the factors contributing to the satisfaction/dissatisfaction rating, based on the available responses;
- E. The CONSULTANT shall present the results by indicating the following: response rates per service; total number of transacting clients during the period covered; client demographics; Citizen's Charter results; Service Quality Dimension results, and free responses derived from the response in the ARTA-prescribed questionnaire;
- F. The CONSULTANT shall perform data interpretation and analysis of the results of the 2023 HCSM. This analysis shall reflect aspects/attributes for improvement as well as performance highlights during the year;
- G. The CONSULTANT shall guide the BCDA in the preparation of its Continuous Agency Improvement Plan for the following year and present this as part of the

HCSM Final Report. These shall contain the action steps, the responsible unit/person, and a timeline.

- H. The CONSULTANT shall prepare and complete the Final Report in accordance with the Client Satisfaction Measurement Report Outline in Annex B of the GCG-ARTA *Joint Memorandum Circular No. 1, Series of 2023 or the Supplemental Guidelines to the ARTA Memorandum Circular No. 2022-05*.

A reference for the Report Outline is shown below:

1. Title Page
  2. Table of Contents
  3. Overview
  4. Scope and Methodology
    - a. Period Covered
    - b. Geographic and Office Coverage
    - c. List of services surveyed
    - d. Sampling
      - i. Applied confidence level and margin of error
      - ii. Mode of survey implementation (e.g. Paper questionnaire in the office)
    - e. Feedback and Collection Mechanism
    - f. Scoring System
      - i. Table of the scale and its equivalent number
    - g. How Numerical Results will be interpreted
  5. Results
    - a. Response rates (per service)
      - i. Number of Clients surveyed per service
      - ii. Number of Clients surveyed per customer type
    - b. Total number of transacting clients during the period (per service)
    - c. Client Demographic
    - d. Citizen's Charter results
    - e. Service Quality Dimension (SQD) results
    - f. Free responses
  6. Continuous Agency Improvement Plan for the Following Year
  7. Index
    - a. Clear Image of Physical CSM survey used
    - b. Detailed list of regional and satellite offices covered
    - c. CSM results of each regional and satellite office
      - i. Response rates of each office
      - ii. Demographic of each office
      - iii. Citizen's Charter results of each office
      - iv. SQD results of each office
- I. The CONSULTANT shall present to BCDA Management the results of the 2023 BCDA Client Satisfaction Measurement Report to derive their inputs and comments for implementation in the Final Report that will be submitted to the ARTA. A summary of the results is also requested for immediate reference.



J. The CONSULTANT shall attend meetings with key BCDA departments, if necessary, for the smooth conduct of the 2023 BCDA Customer Satisfaction Measurement.

K. The CONSULTANT shall adhere to the following timeline:.

<b>Deliverables</b>	<b>Schedule</b>
Data Encoding	November 2023- January 12, 2024
Data Processing and Analysis	January 15 - 26, 2024
Preparation of Initial Report	January 29 - February 8, 2024
Submission of Survey Results and Initial Presentation to PAD	February 9, 2024, Friday
Presentation to MANCOM	February 15, 2024, Thursday
Gathering of Action Plan from BCDA Departments	March 4 -15, 2024
Collation and Final Report Preparation	March 18-29, 2024
Submission of Final Report to BCDA/Approval of the President and CEO	April 1, 2024, Monday
Submission to ARTA	April 12, 2024, Friday

L. The CONSULTANT shall shoulder the compensation of the project team and support staff that will be engaged for the conduct and preparation of the HCSM Report, as well as the expenses for meals, and transportation, if relevant.

## VI. **METHODOLOGY**

- A. The prospective CONSULTANTS shall be evaluated based on a Quality-Cost Based Evaluation (QCBE) as prescribed in Section 33.2.1.B of the IRR of RA 9184.
- B. Each CONSULTANT shall submit its technical and financial proposals simultaneously in separate sealed envelopes.
- C. The technical proposal together with the financial proposal shall be considered in the evaluation of consultants. The technical proposals shall be evaluated first using the criteria in Section 33.2.2 of the IRR of RA 9184. Only the financial proposals of consultants who meet the minimum technical score of 70% shall then be opened.

- D. The financial proposal will be computed in the following manner:
1. The CONSULTANT with the lowest financial proposal gets 100 points.
  2. The scores of the other CONSULTANTS will be computed using the formula:

$$S_f = 100 \times F_1/F$$

Where  $S_f$  is the financial score,  $F_1$  is the lowest financial proposal and  $F$  is the financial proposal for consideration.

- E. The weight of the technical criteria together with the weight given to the financial proposal shall add to one hundred percent (100%).
- F. Each CONSULTANT shall be evaluated according to BCDA’s Criteria for Determining the Highest Rated Bid. Shown below are percentage values for the financial proposal and the technical proposal and the breakdown of values.

<b>Evaluation Criteria</b>	<b>Weight</b>	<b>Minimum Technical Score</b>
<b>Technical Proposal</b>	<b>85%</b>	
Applicable Years of Experience of the Consultant/Firm (20%)	20%	
Similar projects completed (20%)	20%	
Qualification of personnel who shall be assigned to the project (20%)	20%	
Plan of Approach (40%)	40%	
<b>Financial Proposal</b>	<b>15%</b>	
<b>TOTAL SCORE</b>	<b>100%</b>	<b>70%</b>

The **Minimum Technical Score** of 70% should be met.

- G. The average score of each qualified CONSULTANT’s technical proposal will be multiplied with the percentage value allowed as weight for Technical Proposals. The score earned by each CONSULTANT’s financial proposal will also be multiplied with the percentage value allowed as weight of the Financial Proposal. The sum of both products becomes the total score of each CONSULTANT. The formula is shown below:

$$S = S_t \times T\% + S_f \times F\%$$

Where  $S$  is the Total Score;  $S_t$  is the technical score;  $S_f$  is the financial score;  $T$  is the weight given to the Technical Proposal and  $F$  is the weight given to the Financial Proposal.

- H. CONSULTANTS shall then be ranked in descending order based on the combined numerical ratings of their technical and financial proposals, from which the highest rated bid will be identified.
- I. The financial proposals shall not exceed the approved budget for the contract and shall be deemed to include the cost of all taxes, duties, fees, levies and other charges imposed under applicable laws.
- J. The conduct of Small Value Procurement for the Consulting Services for the 2023 BCDA Client Satisfaction Measurement (BCDA 2023 Stakeholder Satisfaction Study) may be delegated to the Public Affairs Department (end-user unit) as duly authorized by the Bids and Awards Committee for Consultancy. This is in accordance with Section 2(c) of the Guidelines for Shopping and Small Value Procurement by the Government Procurement Policy Board (GPPB) and Annex H of the IRR 9184.
- K. For recording and monitoring purposes, all awards shall be immediately reported with all supporting documents to the Head of the Procurement Entity, through the BAC-C, to ensure compliance with all the conditions and requirements provided for under R.A. 9184, its IRR and related guidelines.

## VII. MINIMUM QUALIFICATIONS OF THE CONSULTANT

- A. The CONSULTANT must strictly be a reputable research and/or communications firm which has been in operations for at least two (2) years. In the case of joint ventures, the lead consulting firm should have at least two (2) years of business operation.
- B. The CONSULTANT must have completed at least three (3) research projects which are similar in nature to the requirement within the past two years (e.g. evaluative research, survey, stakeholder relations studies, etc.)
- C. The CONSULTANT must provide the necessary manpower support for the conduct of the Customer Satisfaction Measurement Report, based on the ARTA guidelines;
- D. The **research team** must be composed of the following four (4) key members: **OVERALL PROJECT MANAGER, RESEARCH EXECUTIVE/ANALYST, DATA PROCESSING MANAGER AND LEAD STATISTICIAN.**
- E. The identified members of the proposed research team must have at least three (3) years experience in communications research as related to his function in the team.
- F. The identified members of the proposed research team must have handled at least three (3) research projects (e.g. evaluative research, survey, stakeholder relations studies, etc.) which are similar in nature to the requirement in a

capacity related to his/her function in the team.

- G. The identified members of the proposed research team must have at least a bachelor's degree and at least eight (8) aggregate hours of training relevant to nominated position in the last eight (8 years).
- H. The CONSULTANT must be registered online with the Philippine Government Electronic Procurement System (<http://www.philgeps.gov.ph>) as a legitimate service provider for government requirements. The CONSULTANT is mandated to register with the PhilGEPS and provide a PhilGEPS Registration number as a condition for award of the contract.
- I. The CONSULTANT shall be assessed based on the most favorable compliance with the criteria.

## VIII. REQUIREMENTS

### A. Technical Proposal:

The CONSULTANT is required to submit the following documents described in Annex H of the Revised IRR of RA 9184 under “Appendix A: Documentary Requirement of Alternative Methods of Procurement as bases for technical evaluation by BCDA.

Annex A: **Valid and current Mayor’s Permit** (city or municipal)/Municipal License, where the principal place of business of the prospective bidder is located.

Annex B: **PhilGEPS Registration Number**

Annex C: **Company Profile**

Annex D: **List of similar projects completed by the firm in the past two years (projects awarded from 13 October 2021 and completed on or before the deadline of submission of technical proposal (Technical Proposal Form 1)**

Annex E: **CV of Consultant’s Assigned Key Team Members**  
Each CV should show the length of experience and a list of ongoing and completed projects handled from **from 13 October 2021 until the deadline of submission of technical proposal (Technical Proposal Form 2)**

Annex F: **CSM Plan of Approach**

- 1) Research Context
- 2) Objectives
- 3) Research Team Roles
- 4) Details of Sampling Strategy/Computation
- 5) Data Processing & Analysis
- 6) Report Preparation

## 7) Timeline

Annex G: **Omnibus Sworn Statement** (*Technical Proposal Form 3*)

Annex H: **Latest Income/Business Tax Return**

### **B. Financial Proposal :**

The CONSULTANT is also required to submit its **Financial Proposal in a separate sealed envelope**. The financial proposals shall not exceed the approved budget for the contract and shall be deemed to include the cost of all taxes, duties, fees, levies and other charges imposed under applicable laws. Only the financial proposals of the consultants who meet the minimum technical score of 70% will be opened.

### **C. Sealing of Proposal:**

The CONSULTANT shall enclose its technical proposal and other documentary requirements (Annexes A to H) in one sealed envelope marked "TECHNICAL PROPOSAL," and the financial proposal in **another** sealed envelope marked "FINANCIAL PROPOSAL." Both envelopes will be enclosed in an outer envelope marked "BIDDING PROPOSAL FOR CONSULTING SERVICES FOR THE 2023 BCDA CLIENT SATISFACTION MEASUREMENT (BCDA 2023 Stakeholder Satisfaction Study)."

## **IX. TERMS OF PAYMENT**

For the services rendered under the Contract, the CONSULTANT shall be paid the maximum amount of Six Hundred Thousand Pesos (Php600,000.00), or the total amount indicated in the bid but not higher than the ABC, which is inclusive of all applicable taxes, fees and incidental expenses.

The CONSULTANT shall be paid in the following terms:

- 20% upon completion of data encoding
- 50% upon submission and approval of the Initial Report
- 30% upon submission to and acceptance by BCDA of the Final Report on the 2023 BCDA Client Satisfaction Measurement

## **X. LIQUIDATED DAMAGES**

The CONSULTANT obligates itself to perform and complete all the Services within the period specified in Item. XII beginning from the starting date exclusive of such extensions of time as may be mutually agreed upon in writing. Should the CONSULTANT fail to complete the Services within the stipulated time, liquidated damages, not by way of penalty, shall be paid to BCDA by the CONSULTANT in an amount equal to one-tenth of one percent (1/10 of 1%) of the total Contract price

minus the value of the completed portions of the Contract certified by BCDA for each calendar day of delay until the Services are completed.

## **XI. SERVICES**

### **A. Standard of Service**

The CONSULTANT shall fulfill its obligations under the Contract by using its technical expertise and according to the best-accepted professional and industry standards. The CONSULTANT shall exercise all reasonable skill, care, diligence, and prudence in the discharge of the duties agreed to be performed and shall always work in the best interest of BCDA. To attain these, the CONSULTANT shall provide additional personnel with sufficient qualifications and experience to ensure the full and satisfactory accomplishment of the required services/undertakings.

The services shall be conducted by the CONSULTANT in accordance with the instructions or directions made or to be made by the BCDA at any time before its completion. The CONSULTANT shall conduct regular consultation with BCDA in relation to the undertaking of its responsibilities under the Contract.

### **B. Confidentiality Clause**

The CONSULTANT shall hold and maintain confidential all materials and information which shall come into its possession, or knowledge in connection with the Contract or its performance, and not to make use thereof other than for the purpose of the Contract.

After the completion or termination of the Contract, all materials, data, proprietary information and other related documents provided to the CONSULTANT and which have been derived in relation to and as a consequence of the implementation of the Contract, shall be immediately turned over to BCDA without need of demand.

The CONSULTANT undertakes that it shall make appropriate instructions to its employees who need to have access to such information and materials to strictly observe the confidentiality thereof.

The CONSULTANT shall likewise oblige the supplier/service provider to be bound by this confidentiality.

The obligation of the CONSULTANT under this Section shall remain effective even after the termination of this Contract.

Any violation of this Article by the CONSULTANT shall make him liable to BCDA for the penalty equal to ten percent (10%) of the total consideration stipulated herein.

### **C. Reservation Clause**

BCDA has the right to reject any and all bids, declare a failure of bidding, or award the contract in the following situations:

1. If there is prima facie evidence of collusion between officers or employees of BCDA, or between the BAC or any of its members and any of the bidders, or if the collusion is between or among the bidders themselves, or between a bidder and a third party, including any act which restricts, suppresses or nullifies or tends to restrict, suppress or nullify competition;
2. If the BAC found to have failed in following the prescribed bidding procedures; or,
3. For any justifiable and reasonable ground where the award of the contract will not redound to the benefit of BCDA, as follows:
  - a. If the physical and economic conditions have significantly changed so as to render the project no longer economically, financially, or technically feasible, as determined by BCDA;
  - b. If the project is no longer necessary as determined by BCDA;
  - c. If the source of funds for the project has been withheld or reduced through no fault of BCDA.

### **D. Corrupt, Fraudulent, Collusion and Coercive Practices**

Any attempt by a bidder to influence the BAC or its authorized representatives in the evaluation of the bids or contract award decision shall result in the rejection of its bid or revocation of award as the case may be, and the implementation of other sanction as remedies provided by law.

## **XII. CONTRACT TERM**

This Contract shall become effective for a period of six (6) months commencing from the date stated in the Notice to Proceed until the approval of the Final Report by BCDA and submission to the ARTA.



**MEMORANDUM CIRCULAR NO. 2022 - 05**  
**SERIES OF 2022**

**FOR:** ALL GOVERNMENT AGENCIES AND OFFICES COVERED BY REPUBLIC ACT NO. 11032 INCLUDING LOCAL GOVERNMENT UNITS (LGUs), GOVERNMENT-OWNED OR -CONTROLLED CORPORATIONS (GOCCs), LOCAL WATER DISTRICTS, STATE UNIVERSITIES AND COLLEGES (SUCs), AND OTHER GOVERNMENT INSTRUMENTALITIES

**SUBJECT:** GUIDELINES ON THE IMPLEMENTATION OF THE HARMONIZED CLIENT SATISFACTION MEASUREMENT

**DATE:** 20 September 2022

---

**1. LEGAL BASES**

- 1.1 Pursuant to Section 20 of the Republic Act (RA) No. 11032 (RA No. 11032) or the *Ease of Doing Business and Efficient Government Service Delivery Act of 2018*, which amended and renumbered Section 10 of R.A. No. 9485 or the *Anti-Red Tape Act of 2007* to Section 20, a feedback mechanism shall be established in all government agencies covered under Section 3 of R.A. No. 11032.
- 1.2 Section 3 (b), Rule IV of the Implementing Rules and Regulations (IRR) of R.A. 11032 also states that "All agencies shall embed feedback mechanisms and client satisfaction measurement in their process improvement efforts. The agency shall report to the Authority the results of the Client Satisfaction Survey for each service based on the guidelines to be issued by the Authority."
- 1.3 ARTA Memorandum Circular (MC) No. 2019-002 provides that the Client Satisfaction Measurement (CSM) report of all government agencies shall be submitted to the Authority on or before the last working day of January of every year.

**2. PURPOSE**

- 2.1. Promoting the adoption of a harmonized and standardized framework in measuring client satisfaction across all levels of the government will ensure continuous improvement and enhancement of service promise towards a more meaningful client-centered Citizen's Charter.



- 2.2. Considering the diverse function of government offices, it has been difficult to measure and compare the service performance of government agencies. Furthermore, client satisfaction surveys have been conducted through different methodologies and have been submitted to different government bodies. As a result, there is a need to develop a client satisfaction survey that is applicable to every government agency and is reported in a uniform manner.
- 2.3. The Anti Red Tape Authority (Authority) developed the harmonized CSM for agencies as 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.
- 2.4. This Memorandum Circular is issued to provide all government agencies covered by R.A. No. 11032 with instructions and guidance on the use of a harmonized CSM tool. Other agencies not covered by R.A. 11032 have the option to use the said tool.

### 3. COVERAGE

These Guidelines shall be adopted by all government agencies and offices covered under Section 3 of R.A. No. 11032 including Local Government Units (LGUs), Government-Owned or -Controlled Corporations (GOCCs), Local Water Districts, State Universities and Colleges (SUCs), and other Government Instrumentalities.

### 4. GENERAL GUIDELINES

4.1. As mandated by Section 3 (b), Rule IV of the IRR of R.A. 11032, client satisfaction feedback shall be gathered for **all services offered** by the government agency. This shall include both External and Internal Services.

4.1.1. As defined in Section 3.1.2.3 of ARTA M.C. No. 2019-002-A:

4.1.1.1. **External Services** refer to government services applied for or requested by external citizens or clients or those who do not form part or belong to the government agency or office providing the service.

4.1.1.2. **Internal Services** refer to government services applied for or requested by citizens or clients who are within the respective government agency or office, such as, but not limited to, its personnel or employees, whether regular or contractual.



4.1.2. For year 2023, government agencies may have the option to cover only their external services. However, beginning year 2024 both internal and external services will be covered.

4.2. Agencies that already have an implemented client feedback mechanism may have the option to replace it with the harmonized CSM tool or supplement/integrate the harmonized CSM tool within their existing tool.

#### 4.3. **Methodology of the Client Satisfaction Measurement (CSM)**

4.3.1. **Identification of Eligible Respondents.** Government agencies shall administer the CSM to **ALL clients with completed transaction**. Clients who completed multiple transactions shall have the opportunity to accomplish the CSM for each availed service. A transaction is considered complete when the final step of the service availed of per the Citizen's Charter of the government agency is accomplished.

4.3.2. **Frequency and Period of the Survey.** The CSM shall be conducted after each completed transaction. It shall be administered between January – December of each year.

4.3.3. **Number of Respondents.** Government agencies shall determine the minimum number of responses per service based on the calculator found in the link below. Government agencies shall continue to conduct the CSM, even when the minimum has been reached.

<https://tinyurl.com/CSMsamplesize>

4.3.4. **Data Gathering.** Government agencies are encouraged to implement the CSM using various data gathering methods, to the greatest extent feasible, to maximize response rates.

4.3.4.1. **On-site Conduct.** The on-site conduct of the CSM may be done through a paper survey questionnaire. Agencies may have the option to utilize electronic platforms in providing questionnaires to the respondents. For persons with disabilities (PWDs) and senior citizens that need assistance, the Public Assistance and Complaints Desk (PACD) officer or a designated officer shall help the respondents in answering the CSM.

4.3.4.2. **Remote Conduct.** Agencies may administer the CSM to remote respondents through electronic mail, the agency's website, social media, QR Code, or other similar modes.



4.3.5. **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. If convenient, agencies are encouraged to utilize their PACD for the collection mechanism.

#### 4.4. Content of the CSM Questionnaire

4.4.1. **CSM Questions.** All government agencies are mandated to use the CSM questions prescribed by the Authority as stated in Annex A – Client Satisfaction Measurement Questionnaire of this Memorandum Circular. The CSM includes three (3) questions related to the Citizen's Charter, one (1) question related to the client's overall satisfaction with the service availed of, and eight (8) questions related to the following Service Quality Dimensions (SQD):

- a.) **Responsiveness** – the willingness to help, assist, and provide prompt service to citizens/clients.
- b.) **Reliability** – the provision of what is needed and what was promised, following the policy and standards, with zero to a minimal error rate.
- c.) **Access and Facilities** – the convenience of location, ample amenities for comfortable transactions, use of clear signages and modes of technology.
- d.) **Communication** – the act of keeping citizens and clients informed in a language they can easily understand, as well as listening to their feedback.
- e.) **Costs** – the satisfaction with timeliness of the billing, billing process/es, preferred methods of payment, reasonable payment period, value for money, the acceptable range of costs, and qualitative information on the cost of each service.
- f.) **Integrity** – the assurance that there is honesty, justice, fairness, and trust in each service while dealing with the citizens/clients.
- g.) **Assurance** – the capability of frontline staff to perform their duties, product and service knowledge, understand citizen/client needs, helpfulness, and good work relationships.
- h.) **Outcome** – the extent of achieving outcomes or realizing the intended benefits of government services.

4.4.1.1. The CSM questions prescribed by the Authority are fixed and may not be altered, modified, or deleted.

4.4.1.2. Agencies have the option to add service-specific questions to the CSM, provided the revised version will not exceed five (5) minutes for the client to accomplish. The results of the additional questions shall not be included in the computation of the overall score.

4.4.1.3. Aside from the English and Filipino versions of the CSM survey, government agencies shall provide a version translated to the local dialect for easier understanding, provided that the revised version will still be able to capture the SQDs as stated above.

4.4.2. **Demographic Questions.** The demographic questions prescribed by the Authority shall be used for the CSM. Agencies and offices may further add relevant demographic questions to the survey, provided that the revised version will not exceed five (5) minutes for the client to accomplish.

4.4.3. **Open-ended Question.** The CSM shall have an open-ended question at the end of the form where the client has the option to provide additional remarks or feedback not covered/captured by previous questions.

#### 4.5. Rating Scale and Scoring System of the CSM

4.5.1. **Rating Scale.** The CSM shall use a **Five (5) Point Likert Scale** to measure the SQDs. Agencies may utilize smileys/emoticons corresponding to the scale for better visualization to prevent confusion on the corresponding rating.

Scale	Rating
1	Strongly Disagree
2	Disagree
3	Neither Agree nor Disagree
4	Agree
5	Strongly Agree

4.5.2. **Scoring Per Question.** The **percentage of respondents that rated 'Agree' and 'Strongly Agree'** shall be used to get each SQD's score. A question that was answered with two (2) or more check marks shall be considered as invalid.

4.5.3. **Overall Scoring.** The **percentage of respondents that rated 'Agree' and 'Strongly Agree'** for all eight (8) SQDs shall be used to compute the Overall Score. Agencies shall strive to achieve an overall percentage of 80% or higher, or a rating of "Satisfactory" or higher. Interpretation of the results shall be as follows:

Percentage	Rating
Below 60.0%	Poor
60.0%-79.9%	Fair
80.0%-94.9%	Satisfactory
95.0%-100%	Outstanding

#### 4.6. Drafting the CSM Report

4.6.1. Government agencies are required to submit a CSM report following the template/outline provided in Annex B – Client Satisfaction Measurement Report of this Memorandum Circular. This will amend Section 6.7.3. of ARTA M.C. No. 2019-002 which previously required the submission of the report using the agency's existing CSM.

4.6.1.1. A copy of the revised version of the CSM questionnaire shall be attached to the CSM Report as Annex.

4.6.2. Government agencies with regional/field/satellite offices may have the option to submit either unified or separate CSM Reports. However, disaggregated reports of the regional/field/satellite offices are still required to be submitted to the Authority.

#### 4.7. Submission and Publishing of the CSM Report

4.7.1. **All agencies** shall submit their CSM reports implementing these guidelines on the last working day of April 2024.

4.7.2. Agencies and offices shall submit soft copies (in text-readable PDF format) of the CSM report through this link: <https://tinyurl.com/CSMRsubmissions>.



4.7.3. The CSM report shall be uploaded on the official website of the government agency or be made available to the transacting public upon request.

#### **4.8. Verification**

4.8.1. All covered government agencies shall submit their CSM Report duly approved and signed by the Head of the Committee on Anti-Red Tape (CART) to attest that the report is accurate and compliant with these Guidelines.

4.8.2. The ARTA reserves the right to request proof of the survey results, including the answered paper surveys and the excel file of the aggregated data.

4.8.3. The Inspection Checklist program of the Report Card Survey will validate if the CSM is properly implemented.

#### **4.9. Updated Timeline of Submission**

The CSM Report covering the previous year shall be submitted **on or before the last working day of April the following year.**

### **5. TRANSITORY PROVISION**

All covered government agencies shall start implementing these guidelines beginning January 2023.

### **6. AMENDMENT TO THE GUIDELINES**

The guidelines outlined in this Memorandum Circular are subject to change as deemed necessary by the Authority.

### **7. REPEALING CLAUSE**

Provisions of previous issuances of the Authority that are inconsistent with this Memorandum Circular are hereby reversed, set aside, or declared ineffective.

### **8. SEPARABILITY CLAUSE**

If any provisions or part of this Circular is held unconstitutional or invalid, it shall not affect the validity of the remaining provisions of this Circular.

## 9. EFFECTIVITY

This Circular shall take effect immediately upon publication and registration with the University of the Philippines – Office of the National Administrative Register (UP-ONAR).

## 10. REFERENCES

The following additional documents are available online at the official website of the ARTA at [www.arta.gov.ph](http://www.arta.gov.ph):

Annex A. Client Satisfaction Measurement Questionnaire

Annex B. Client Satisfaction Measurement Report Outline and Sample Report

### APPROVED BY:



**DDG ERNESTO V. PEREZ**  
Officer-in-Charge



## Annex A

# Client Satisfaction Measurement Questionnaire



Control No: \_\_\_\_\_

(Insert agency logo here) (Insert agency name here)  
**HELP US SERVE YOU BETTER!**

This Client Satisfaction Measurement (CSM) tracks the customer experience of government offices. Your feedback on your recently concluded transaction will help this office provide a better service. Personal information shared will be kept confidential and you always have the option to not answer this form.

Client type:  Citizen  Business  Government (Employee or another agency)

Date: \_\_\_\_\_ Sex:  Male  Female Age: \_\_\_\_\_






Region of residence: \_\_\_\_\_ Service Availed: \_\_\_\_\_

**INSTRUCTIONS: Check mark (✓) your answer to the Citizen's Charter (CC) questions. The Citizen's Charter is an official document that reflects the services of a government agency/office including its requirements, fees, and processing times among others.**

- CC1 Which of the following best describes your awareness of a CC?**
- 1. I know what a CC is and I saw this office's CC.
  - 2. I know what a CC is but I did NOT see this office's CC.
  - 3. I learned of the CC only when I saw this office's CC.
  - 4. I do not know what a CC is and I did not see one in this office. (Answer 'N/A' on CC2 and CC3)
- CC2 If aware of CC (answered 1-3 in CC1), would you say that the CC of this office was ...?**
- 1. Easy to see
  - 2. Somewhat easy to see
  - 3. Difficult to see
  - 4. Not visible at all
  - 5. N/A
- CC3 If aware of CC (answered codes 1-3 in CC1), how much did the CC help you in your transaction?**
- 1. Helped very much
  - 2. Somewhat helped
  - 3. Did not help
  - 4. N/A

**INSTRUCTIONS:**

For SQD 0-8, please put a **check mark (✓)** on the column that best corresponds to your answer.

	 Strongly Disagree	 Disagree	 Neither Agree nor Disagree	 Agree	 Strongly Agree	N/A Not Applicable
<b>SQD0.</b> I am satisfied with the service that I availed.						
<b>SQD1.</b> I spent a reasonable amount of time for my transaction.						
<b>SQD2.</b> The office followed the transaction's requirements and steps based on the information provided.						
<b>SQD3.</b> The steps (including payment) I needed to do for my transaction were easy and simple.						
<b>SQD4.</b> I easily found information about my transaction from the office or its website.						
<b>SQD5.</b> I paid a reasonable amount of fees for my transaction.						
<b>SQD6.</b> I feel the office was fair to everyone, or " <i>walang palakasan</i> ", during my transaction.						
<b>SQD7.</b> I was treated courteously by the staff, and (if asked for help) the staff was helpful.						
<b>SQD8.</b> I got what I needed from the government office, or (if denied) denial of request was sufficiently explained to me.						

Suggestions on how we can further improve our services (optional):

\_\_\_\_\_

\_\_\_\_\_

Email address (optional): \_\_\_\_\_

**THANK YOU!**

(Online Version)

(Insert agency logo here) (Insert agency name here)

**HELP US SERVE YOU BETTER!**

This short Client Satisfaction Measurement (CSM) survey aims to track the customer experience of government offices. Your answers will enable this office to provide a better service.

Age: \_\_\_\_\_ Sex: \_\_\_\_\_ Region: \_\_\_\_\_

Agency visited: \_\_\_\_\_

Service availed: \_\_\_\_\_

Customer type (Citizen, Business, or Government?): \_\_\_\_\_

**INSTRUCTIONS: Check mark (✓) your answer to the Citizen's Charter (CC) questions.**

**CC1** Do you know about the Citizen's Charter (document of an agency's services and reqs.)?

- 1. Yes, aware before my transaction with this office
- 2. Yes, but aware only when I saw the CC of this office
- 3. No, not aware of the CC (Skip questions CC2 and CC3)

**CC2** If **Yes** to the previous question, did you see this office's Citizen's Charter?






- 1. Yes, the CC was easy to find
- 2. Yes, but the CC was hard to find
- 3. No, I did not see this office's CC (Skip question CC3)

**CC3** If **Yes** to the previous question, did you use the Citizen's Charter as a guide for the service/s you availed?

- 1. Yes, I was able to use the CC
- 2. No, I was not able to use the CC because \_\_\_\_\_

**INSTRUCTIONS: For SQD 1-8, please encircle the number that corresponds to your answer:**

Strongly Disagree (SD)	Disagree (D)	Neither Agree nor Disagree (NAD)	Agree (A)	Strongly Agree (SA)
1	2	3	4	5

	 Strongly Disagree	 Disagree	 Neither Agree nor Disagree	 Agree	 Strongly Agree
SQD1. I spent an acceptable amount of time to complete my transaction ( <i>Responsiveness</i> )	1	2	3	4	5
SQD2. The office accurately informed and followed the transaction's requirements and steps ( <i>Reliability</i> )	1	2	3	4	5
SQD3. My online transaction (including steps and payment) was simple and convenient ( <i>Access and Facilities</i> )	1	2	3	4	5
SQD4. I easily found information about my transaction from the office or its website ( <i>Communication</i> )	1	2	3	4	5
SQD5. I paid an acceptable amount of fees for my transaction ( <i>Costs</i> )	1	2	3	4	5
SQD6. I am confident my online transaction was secure ( <i>Integrity</i> )	1	2	3	4	5
SQD7. The office's online support was available, or (if asked questions) online support was quick to respond ( <i>Assurance</i> )	1	2	3	4	5
SQD8. I got what I needed from the government office ( <i>Outcome</i> )	1	2	3	4	5

Remarks (optional):

\_\_\_\_\_

## **Annex B**

# **Client Satisfaction Measurement (CSM) Report Outline**

## Harmonized CSM Report Outline:

### I. Title Page

- *This section shall contain the Agency's official logo and official name. The page shall also include the label "Client Satisfaction Measurement Report", the year covered by the report, and the report's edition (Ex. 2nd Edition).*

### II. Table of Contents

### III. Overview

- *The content of the Overview section shall be at the discretion of the agency. It may include a brief description of the agency and the CSM mandate.*

### IV. Scope and Methodology

#### a. Period covered

#### b. Geographic and Office coverage

#### c. List of services surveyed

#### d. Sampling

##### i. Applied confidence level and margin of error

##### ii. Mode of survey implementation (Ex. Paper questionnaire in the office)

- *The Scope section of the CSM Report shall include the period the survey was conducted and the geographical coverage of the survey.*
- *In addition, the section 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).*
- *The agency shall create a separate table for services that had no clients during the period.*
- *The sampling calculator is attached in the CSM Guidelines document.*

#### e. Feedback and Collection Mechanism

#### f. Scoring system

##### i. Table of the scale and its equivalent number

#### g. How numerical results will be interpreted

- *The Methodology section of the CSM Report shall discuss all the physical and digital methods used by the agency to implement the CSM survey.*
- *Additionally, the section shall provide a table of the 5-point Likert scale and the survey's scoring system.*

### V. Results

#### a. Response rates (per service)

##### i. Number of clients surveyed per service

##### ii. Number of clients surveyed per customer type

#### b. Total number of transacting clients during the period (per service)

#### c. Client Demographic

**d. Citizen's Charter results**

**e. Service Quality Dimension results**

**f. Free responses**

- *The response rate is integral to the survey so it shall be explicitly stated in the CSM report. It shall be followed by a discussion of why the agency thinks the response rate is high, low, or as expected.*
- *Furthermore, the agency shall provide reasons for why services have 0 responses, if any.*
- *A breakdown of the client demographic shall be provided. The agency may provide an analysis based on how it may or may not be representative of its population.*
- *Then, a breakdown of the Citizen's Charter questions and Service Quality Dimension questions by result count shall be provided. The agency shall provide an analysis of the results.*
- *Afterward, a breakdown of each services' scores shall be provided. The agency shall also provide an analysis of these results.*

**VI. Results of the Agency Action Plan reported in the previous year**

**VII. Continuous Agency Improvement Plan for the following year**

- *Sections VI and VII shall contain the action steps, the responsible unit/person, and a timeline. Agencies are also encouraged to incorporate CSM findings to the Improvement Plan.*
- *Section VI shall not apply for the first year of CSM implementation*

**VIII. Index**

**A. Clear image of physical CSM survey used**

**B. Detailed list of regional and satellite offices covered**

**C. CSM results of each regional and satellite office**

- i. Response rates of each office**
- ii. Demographic of each office**
- iii. Citizen's Charter results of each office**
- iv. SQD results of each office**



**ARTA**  
ANTI-RED TAPE AUTHORITY  
OFFICE OF THE PRESIDENT



# Client Satisfaction Measurement Sample Report

DISCLAIMER: ALL NUMBERS IN THIS SAMPLE HAVE BEEN RANDOMIZED AND ARE NOT REPRESENTATIVE OF THE AGENCY'S ACTUAL PERFORMANCE

COVER PAGE

(This header is not included in actual template)

INSERT AGENCY LOGO HERE

Size: Official Dimensions of the Official Logo  
Resolution: High resolution

AGENCY NAME

Font Style: Official Font Style of the Government Agency Name  
Font Size: Should at least be 20

Harmonized CSM Report

Font Size: Should at least be 20

2023 (1<sup>st</sup> Edition)

Text: Year (No. of Edition)  
Font Size: Should at least be 16

DISCLAIMER: ALL NUMBERS IN THIS SAMPLE HAVE BEEN RANDOMIZED AND ARE NOT REPRESENTATIVE OF THE AGENCY'S ACTUAL PERFORMANCE



Harmonized CSM Report

Font Size: Should at least be 20

2023 (1<sup>st</sup> Edition)

Text: Year (No. of Edition)  
Font Size: Should at least be 16



DISCLAIMER: ALL NUMBERS IN THIS SAMPLE HAVE BEEN RANDOMIZED AND ARE NOT REPRESENTATIVE OF THE AGENCY'S ACTUAL PERFORMANCE

INSERT AGENCY LOGO HERE

AGENCY PROFILE  
(This header is not included in actual template)

Alignment: Top Rightmost Corner  
Height: 1 Inch  
Resolution: High Resolution  
  
From this page onwards, the official logo of the government agency shall be printed at the top rightmost corner of the header of every page

## I. Overview:

The Anti-Red Tape Authority (ARTA) is a national government agency of the R.A. 11032 to monitor and ensure compliance with the national policy of transparency and ease of doing business in the Philippines.

As stated in the ARTA Memorandum Circular (M.C.) No. 2022-02, government agencies shall provide the harmonized CSM survey to clients who have completed a transaction. Per 6.7.3 of ARTA M.C. No. 2019-002, the client satisfaction measurement detailing the scope and period covered by the measurement, the methodology used, the results of the measurement, and the interpretation of the data shall be reported to the Authority.

## II. Scope:

ARTA conducted surveys throughout the year from Jan. 2022 to Dec. 2022.

ARTA surveyed every client that visited the main and regional offices, as well as those that contacted ARTA through email.

The survey used the standard harmonized CSM questionnaire. It asked clients demographical questions, three (3) Citizen's Charter questions, and eight (8) questions related to the following Service Quality Dimensions:

1. Responsiveness
2. Reliability
3. Access and Facilities
4. Communication
5. Costs
6. Integrity
7. Assurance
8. Outcome

The services ARTA surveyed are the following:

External Services	Total	
	Responses	Transactions
Submission of Comments on Proposed Major Regulations (Online)	258	431
Submission of Comments on Proposed Major Regulations (Walk-In)	204	512
Request for Data related to Business Regulations (Online)	59	78
Request for Data related to Business Regulations (Walk-In)	8	16
Request for Doing Business Data/Information	21	33

DISCLAIMER: ALL NUMBERS IN THIS SAMPLE HAVE BEEN RANDOMIZED AND ARE NOT REPRESENTATIVE OF THE AGENCY'S ACTUAL PERFORMANCE

Request for Regulatory Impact Assessment (RIA) Training	32	32
Response to E-mail Clarification/Inquiry (Compliance-Related)	167	488
Filing of Non-ARTA Related Complaints	24	24
Filing of Complaints (Email)	271	849
Filing of Complaints (Physical Letter)	19	40
Filing of Complaints (Walk-in)	29	36
Request for Legal Opinion	71	101
Request for Comment (BRO)	42	100
Request for Issuance of Compliance Order (CMEO)	22	26
Request for Issuance of Order of Automatic Approval/Extension for Complex Transactions	49	75
Request for Issuance of Order of Automatic Approval/Extension for Complex Transactions (with Standard Disposition of Complaints)	33	39
Request for Issuance of Order of Automatic Approval/Extension for Highly Technical Transactions	15	34
Request for Issuance of Order of Automatic Approval/Extension for Highly Technical Transactions (with Standard Disposition of Complaints)	11	22
Standard procedure for the disposition of complaints endorsed to ARTA-IELO	16	20
Request for Briefing	56	81
Request for Statements/Advisories	73	153
Hiring of Plantilla Personnel for Successful Applications	36	49
Hiring of Plantilla Personnel for Failed Applications	108	327
<b>Internal Services</b>		
Request for Evaluation of Citizen's Charter	38	73
Request for ARTA Collaterals	15	21
Processing of Payroll	446	2436
Request for Certification of Availability of Funds	43	80
Disbursements	68	95
Cash Advance from Petty Cash Fund	26	37
Request for Expenses from Petty Cash Fund	33	51
Purchase Request for Goods (Items, Supplies, and Materials) through public bidding	9	17
Purchase Request for Goods (Items, Supplies, and Materials) through shopping	13	20
General Services for Building and Maintenance Request (Simple Repairs)	19	29
General Services for Building and Maintenance Request (Complex Request/ Requiring AMP)	0	8
Documentation and Assigning of Serial Number for Office Orders, Memorandum Circulars, and Other Official Issuances	0	5
Receiving of Incoming Documents	38	38
Request for Certified True Copy of Department Orders, Administrative Orders, and Other ARTA Issuances	17	17
Receiving of Inventory Items	23	23
Request and Issuance of Inventory Items	18	18
Request for ICT Technical Support	16	18
Request for Employee Records	38	38
Application for Leave	332	332
<b>TOTAL</b>	<b>2816</b>	<b>6920</b>

In aggregate, 2,816 people were able to answer the survey, among a population of 6,920. This resulted in a 41% response rate for 2022.

DISCLAIMER: ALL NUMBERS IN THIS SAMPLE HAVE BEEN RANDOMIZED AND ARE NOT REPRESENTATIVE OF THE AGENCY'S ACTUAL PERFORMANCE

Services that had no clients in 2022 are the following:

Request for Issuance of Order of Automatic Approval/Extension for Complex Transactions (with Disposition of Complaints via virtual proceedings)
Request for Issuance of Order of Automatic Approval/Extension for Highly Technical Transactions (with Disposition of Complaints via virtual proceedings)

### III. Methodology:

For physical clients, surveys were handed out and collected by ARTA personnel immediately at the end of the transaction. Surveys and survey boxes were also available near the office's exit.

For online clients, emails containing the CSM portal link were sent one (1) week after the last correspondence.

The 8 SQD questions were scored using a 5-point Likert Scale. The simple average of the questions was used to get the Overall score. The interpretation of the results are as follows:

Scale	Average	Rating
1	1.00-1.49	Very Unsatisfied
2	1.50-2.49	Unsatisfied
3	2.50-3.49	Neither Unsatisfied nor Satisfied
4	3.50-4.49	Satisfied
5	4.50-5.00	Very Satisfied

### IV. Results of the harmonized CSM for FY 2022:

#### A. Count of CC and SQD results

While the majority of respondents know the existence of a Citizen's Charter (CC), 49% of clients were still unaware of the CC.

Meanwhile, among those that knew the CC, 77% were able to see ARTA's CC. However, only 34% of clients were able to use it as a guide for their service.

External Services	Responses	Percentage
CC1. Yes, aware before my transaction here	944	33%
CC1. Yes, but aware only when I saw the CC of this office	521	18%
CC1. No, not aware	1370	49%
CC2. Yes, I saw the Citizen's Charter	1135	77%
CC2. No, I did not see the Citizen's Charter	330	23%
CC3. Yes, I was able to read	387	34%

DISCLAIMER: ALL NUMBERS IN THIS SAMPLE HAVE BEEN RANDOMIZED AND ARE NOT REPRESENTATIVE OF THE AGENCY'S ACTUAL PERFORMANCE

CC3. No, I was not able to read	748	66%
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Meanwhile, most respondents were 'Very Satisfied' with ARTA in terms of the 8 service quality dimensions, recording a score range of 4.55-4.72.

The data below shows the breakdown of the results per service quality dimension.

Service Quality Dimensions	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Responses	Rating
Responsiveness	1	12	58	815	1930	2816	4.72
Reliability	5	9	50	1052	1700	2816	4.64
Access and Facilities	2	16	71	938	1789	2816	4.67
Communication	1	18	54	1296	1447	2816	4.55
Costs	1	21	44	971	1779	2816	4.67
Integrity	3	15	38	833	1927	2816	4.72
Assurance	2	17	65	1141	1591	2816	4.60
Outcome	4	14	59	1053	1686	2816	4.64
<b>Overall</b>	19	122	439	8099	13849	22528	4.65

#### B. Average score per service

Looking at the scores per service, respondents were either 'Satisfied' or 'Very Satisfied' with their transactions, recording a score range of 4.00-4.97. No service garnered a score of 3.99 or lower.

As a result, ARTA recorded an Overall score of 4.65, which translates to 'Very Satisfied'.

The data below shows the Overall rating of each service surveyed.

External Services	Overall Rating
Submission of Comments on Proposed Major Regulations (Online)	4.67
Submission of Comments on Proposed Major Regulations (Walk-In)	4.80
Request for Data related to Business Regulations (Online)	4.41
Request for Data related to Business Regulations (Walk-In)	4.07
Request for Doing Business Data/Information	4.97
Request for Regulatory Impact Assessment (RIA) Training	4.38
Response to E-mail Clarification/Inquiry (Compliance-Related)	4.83
Filing of Non-ARTA Related Complaints	4.04
Filing of Complaints (Email)	4.12
Filing of Complaints (Physical Letter)	4.11
Filing of Complaints (Walk-in)	4.65
Request for Legal Opinion	4.71
Request for Comment (BRO)	4.85
Request for Issuance of Compliance Order (CMEO)	4.74

DISCLAIMER: ALL NUMBERS IN THIS SAMPLE HAVE BEEN RANDOMIZED AND ARE NOT REPRESENTATIVE OF THE AGENCY'S ACTUAL PERFORMANCE

Request for Issuance of Order of Automatic Approval/Extension for Complex Transactions	4.27
Request for Issuance of Order of Automatic Approval/Extension for Complex Transactions (with Standard Disposition of Complaints)	4.33
Request for Issuance of Order of Automatic Approval/Extension for Highly Technical Transactions	4.49
Request for Issuance of Order of Automatic Approval/Extension for Highly Technical Transactions (with Standard Disposition of Complaints)	4.15
Standard procedure for the disposition of complaints endorsed to ARTA-IELO	4.00
Request for Briefing	4.61
Request for Statements/Advisories	4.82
Hiring of Plantilla Personnel for Successful Applications	4.07
Hiring of Plantilla Personnel for Failed Applications	4.10
External Service Overall	4.60
<b>Internal Services</b>	
Request for Evaluation of Citizen's Charter	4.13
Request for ARTA Collaterals	4.12
Processing of Payroll	4.76
Request for Certification of Availability of Funds	4.87
Disbursements	4.39
Cash Advance from Petty Cash Fund	4.21
Request for Expenses from Petty Cash Fund	4.48
Purchase Request for Goods (Items, Supplies, and Materials) through public bidding	4.67
Purchase Request for Goods (Items, Supplies, and Materials) through shopping	4.62
General Services for Building and Maintenance Request (Simple Repairs)	4.95
General Services for Building and Maintenance Request (Complex Request/ Requiring AMP)	4.64
Documentation and Assigning of Serial Number for Office Orders, Memorandum Circulars, and Other Official Issuances	4.04
Receiving of Incoming Documents	4.41
Request for Certified True Copy of Department Orders, Administrative Orders, and Other ARTA Issuances	4.73
Receiving of Inventory Items	4.81
Request and Issuance of Inventory Items	4.66
Request for ICT Technical Support	4.54
Request for Employee Records	4.16
Application for Leave	4.78
Internal Service Overall	4.70
<b>Overall</b>	<b>4.65</b>

V. Results of the Agency Action Plan reported in FY 2021:

VI. Continuous Agency Improvement Plan for FY 2023:

Page Number



**ARTA**  
ANTI-RED TAPE AUTHORITY  
OFFICE OF THE PRESIDENT



**JOINT MEMORANDUM CIRCULAR NO. 1  
SERIES OF 2023**

**FOR: ALL GOVERNMENT-OWNED OR -CONTROLLED  
CORPORATIONS (GOCCs) COVERED BY REPUBLIC ACT NO.  
10149**

**SUBJECT: SUPPLEMENTAL GUIDELINES TO THE ARTA MEMORANDUM  
CIRCULAR NO. 2022-05 OR THE GUIDELINES ON THE  
IMPLEMENTATION OF THE HARMONIZED CLIENT  
SATISFACTION MEASUREMENT SPECIFIC FOR GOCCS  
COVERED BY REPUBLIC ACT NO. 10149**

**DATE: 12 April 2023**

**1. LEGAL BASES**

- 1.1. Pursuant to Section 20 of the Republic Act (R.A.) No. 11032<sup>1</sup> or the *Ease of Doing Business and Efficient Government Service Delivery Act of 2018*, which amended and renumbered Section 10 of R.A. No. 9485<sup>2</sup> or the *Anti-Red Tape Act of 2007* to Section 20, a feedback mechanism shall be established in all government agencies covered under Section 3 of R.A. No. 11032.
- 1.2. Section 3(b), Rule IV of the Implementing Rules and Regulations (IRR) of R.A. No. 11032 also states that “[a]ll agencies shall embed feedback mechanisms and client satisfaction measurement in their process improvement efforts. The agency shall report to the [Anti-Red Tape Authority (ARTA)] the results of the Client Satisfaction Survey for each service based on the guidelines issued by the Authority”.
- 1.3. Consistent with Section 3(b), Rule IV of the IRR of R.A. 11032, the Anti-Red Tape Authority (ARTA) issued the ARTA Memorandum Circular (MC) No. 2022-05 or the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement.
- 1.4. R.A. No. 10149,<sup>3</sup> otherwise known as the *GOCC Governance Act of 2011*, created the Governance Commission for GOCCs (GCG) as the central policy-making and regulatory body mandated to safeguard the State’s ownership

<sup>1</sup> AN ACT PROMOTING EASE OF DOING BUSINESS AND EFFICIENT DELIVERY OF GOVERNMENT SERVICES, AMENDING FOR THE PURPOSE REPUBLIC ACT NO. 9485, OTHERWISE KNOWN AS THE ANTI-RED TAPE ACT OF 2007 AND FOR OTHER PURPOSES, approved 28 May 2018.

<sup>2</sup> AN ACT TO IMPROVE EFFICIENCY IN THE DELIVERY OF GOVERNMENT SERVICE TO THE PUBLIC BY REDUCING BUREAUCRATIC RED TAPE, PREVENTING GRAFT AND CORRUPTION, AND PROVIDING PENALTIES THEREFOR, approved 02 June 2007.

<sup>3</sup> AN ACT TO PROMOTE FINANCIAL VIABILITY AND FISCAL DISCIPLINE IN GOVERNMENT-OWNED OR -CONTROLLED CORPORATIONS AND TO STRENGTHEN THE ROLE OF THE STATE IN ITS GOVERNANCE AND MANAGEMENT TO MAKE THEM MORE RESPONSIVE TO THE NEEDS OF PUBLIC INTEREST AND FOR OTHER PURPOSES, approved 06 June 2011.

rights and ensure that the operations of GOCCs are transparent and responsive to the needs of the public.

1.5. In the exercise of its mandate, the GCG adopted GCG MC No. 2012-07<sup>4</sup> or the *Code of Corporate Governance for GOCCs*. Under Section 37 of the GCG M.C. No. 2012-07, GOCC Governing Boards are required to:

- a. Ensure integrity and honesty in dealings with customers and operate a highly effective and efficient 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; and
- b. Operate policies of continuous improvement, of both processes and the skills of the staff, to take best advantage of advances in all aspects of society in order to ensure that it continues to add value to its customers' businesses.

1.6. Under R.A. No. 10149, the Performance Evaluation System (PES) established by the GCG sets the process of appraising the accomplishment of the GOCCs in a given fiscal year based on the set performance criteria. One of the measures in determining the rating in the PES is the overall satisfaction of the clients for the services availed in a GOCC.

## 2. PURPOSE

2.1. This Joint Memorandum Circular (JMC) is being issued to provide supplemental guidance to GOCCs regarding compliance to GCG Memorandum Circular 2023-01<sup>5</sup> and ARTA M.C. No. 2022-05.

2.2. Likewise, this JMC aims to reduce the cost and burden of compliance of GOCCs with the Client Satisfaction Measurement (CSM) and Client Satisfaction Survey (CSS) requirements.

## 3. COVERAGE

3.1. The supplemental guidelines shall be adopted by all GOCCs covered by R.A. No. 10149.

## 4. GENERAL GUIDELINES

4.1. All GOCCs shall conduct their respective CSS as required by the GCG-approved Performance Scorecard. The CSS methodology shall be in accordance with the prescribed Guidelines of the ARTA M.C. No. 2022-05.

4.2. GOCCs may have the option to engage the services of a third-party provider or in-house services for the conduct of the survey.

<sup>4</sup> CODE OF CORPORATE GOVERNANCE FOR GOCCs, approved 28 November 2012.

<sup>5</sup> PERFORMANCE EVALUATION SYSTEM (PES) FOR THE GOCC SECTOR DATED 19 JANUARY 2023.

- 4.3. GOCCs shall follow the survey methodology prescribed by ARTA MC No. 2022-05.
- 4.4. GOCCs shall submit their respective CSM report to the Authority not later than April 15 of each year.
- 4.5. The CSM Reports submitted by the GOCCs shall be validated by the Authority based on the Guidelines set by ARTA M.C. No. 2022-05. Results of the validation shall be submitted by ARTA to GCG not later than May 31 of the following year.
- 4.6. The validated CSM Report of the Authority shall be used by GCG for the CSS measure in the GOCC's Performance Scorecard.
- 4.7. The percentage<sup>6</sup> of respondents that rated 'Agree' (4) and 'Strongly Agree' (5) for Service Quality Dimension 0: "*I am satisfied with the service that I availed*" shall be used for the CSS measure in the GOCC's Performance Scorecard.
- 4.8. The total number of clients who availed of the external services will be the basis of computing the rating.
- 4.9. Respondents in satellite offices and other offices smaller than a branch will be counted under the branch covering these smaller offices.

## 5. AGENCY ROLES AND RESPONSIBILITIES

### 5.1. GOVERNMENT-OWNED AND CONTROLLED CORPORATIONS (GOCCs) COVERED BY R.A. NO. 10149

5.1.1. GOCCs shall endeavor to conduct the CSS for all its external and internal services either through a third-party service provider or an in-house survey.

5.1.2. All GOCCs shall submit the Final Report in accordance with the ARTA-prescribed template/outline pursuant to ARTA M.C. No. 2022-05. The following data/information shall be generated and reflected in the CSM Report, in addition to the existing ARTA-prescribed template/outline.

5.1.2.1. Number of responses: sub-total for external services and sub-total for internal services;

5.1.2.2. Number of transactions: sub-total for external services and sub-total for internal services; and

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<sup>6</sup> Total number of respondents that rated 'Agree' (4) and 'Strongly Agree' (5) for the SQD0 over the total number of respondents.



5.1.2.3. The percentage of respondents that rated 'Agree' and 'Strongly Agree' for each SQD: with breakdown for external services and internal services.

5.1.3. All covered GOCCs shall submit their CSM Report duly approved and signed by the Head of the Committee on Anti-Red Tape (CART) to attest that the report is accurate and compliant with the applicable guidelines.

## 5.2. GOVERNANCE COMMISSION OF GOCCs (GCG)

5.2.1. The GCG may perform random data collection quality control procedures, i.e., spot-checking and back-checking as they deem necessary. The GCG reserves the right to request proof of the survey results, including the sample questionnaires and the Excel file of the aggregated data.

5.2.2. The GCG shall use the ARTA-verified rating as the validated rating for the CSS measure in the GOCC's Performance Scorecard. The GCG may consider the following grounds for Zero Rating:

5.2.2.1. Non-compliance with the ARTA-prescribed methodology and questionnaire

5.2.2.2. Adverse findings during the conduct of spot-checking and/or back-checking

5.2.2.3. Late submission of CSM Report

## 5.3. ANTI-RED TAPE AUTHORITY (ARTA)

5.3.1. The ARTA shall receive CSM reports from GOCCs as submitted and shall record the date of submission.

5.3.2. The ARTA shall check that the CSM report submitted by the GOCC is duly signed by the Head of the Committee on Anti-Red Tape.

5.3.3. The ARTA shall provide the GCG with the verified CSM rating of GOCCs on or before May 31 of the following year.

5.3.4. The ARTA may perform random data collection quality control procedures, i.e., spot-checking and back-checking. The ARTA reserves the right to request proof of the survey results, including the sample questionnaires and the Excel file of the aggregated data.

## 6. TIMELINE OF SUBMISSION

- 6.1. The CSM Report shall be submitted to ARTA on or before 15 April of the following year.
- 6.2. Thereafter, the ARTA shall provide the results of the validated reports to GCG on or before May 31 of the following year.

## 7. REPEALING CLAUSE

Provisions of previous issuances of the ARTA and the GCG that are inconsistent with this Joint Memorandum Circular are hereby reversed, set aside, or declared ineffective.

## 8. SEPARABILITY CLAUSE

If any provisions or part of this Joint Memorandum Circular is held unconstitutional or invalid, it shall not affect the validity of the remaining provisions of this Circular.

Should there be any inconsistency or ambiguity between the provisions of ARTA MC No. 2022-05 and this Joint Memorandum Circular in relation to the Client Satisfaction Measurement, the former shall prevail over the latter.

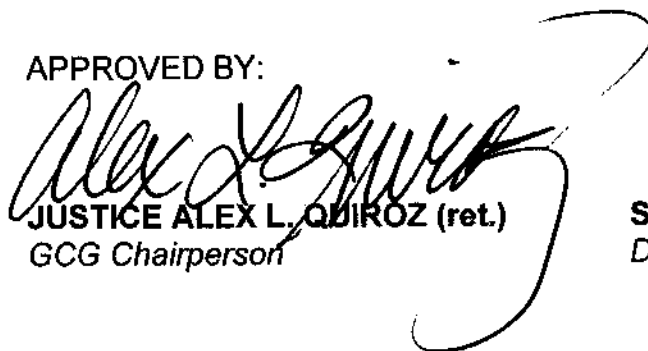
## 9. TRANSITORY PROVISION

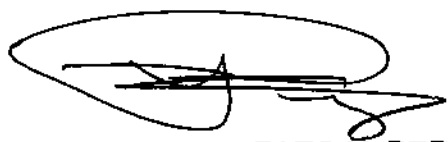
All covered GOCCs shall strictly comply with this Joint Memorandum Circular beginning survey year 2023.

## 10. EFFECTIVITY

This Joint Memorandum Circular shall take effect immediately upon publication and registration with the University of the Philippines – Office of the National Administrative Register (UP-ONAR).

APPROVED BY:

  
**JUSTICE ALEX L. QUIROZ (ret.)**  
*GCG Chairperson*

  
**SECRETARY ERNESTO V. PEREZ**  
*Director General, Anti-Red Tape Authority*