

TERMS OF REFERENCE (TOR)

MODIFICATION AND ENHANCEMENT OF THE QUEZON CITY HOTLINE 122 SERVICE MANAGEMENT SYSTEM FOR CITIZENS' CONCERNS

I. RATIONALE AND BRIEF BACKGROUND

The Local Government Unit of Quezon City, overseeing the largest city in Metro Manila by both land area and population, is committed to continuously improving its citizen services. With over three million (3,000,000) residents, the existing Citizen Helpline 122 service management system, implemented in March 2021, has successfully facilitated the management, organization, and tracking of citizen requests, complaints, and suggestions directed to the Office of the Mayor or relevant departments/offices. The system processes information from multiple sources, including email, SMS, phone calls, and social media channels.

Despite the success of the initial implementation, there is a need to modify and enhance the current system to ensure a higher level of responsiveness and efficiency. Recent evaluations of the system have revealed opportunities for improvement, particularly in ensuring tickets are promptly resolved and that case assignments are effectively communicated and managed by the relevant departments.

This modification aims to refine the existing CRM by enhancing case management capabilities, integrating additional tools, and ensuring that all departments properly utilize system notifications to address issues within prescribed turnaround times.

II. PROJECT DESCRIPTION

The project aims to upgrade Quezon City's Citizen Helpline 122 service management system, creating a unified platform to enhance departmental coordination and accountability. This enhanced system will provide a comprehensive view of citizen requests, complaints, and concerns, streamlining the assignment, tracking, and resolution process across multiple communication channels. Citizen concerns, captured via contact center, social media, or email, will be assigned a case number and routed to the appropriate department for resolution. Certain cases may be escalated directly to relevant departments, ensuring timely and efficient handling. Serving as the central repository for citizen concerns, the platform offers a real-time source of truth, improving transparency and accountability across departments. Advanced data analytics will enable strategic insights, supporting the city's continuous improvement in public service delivery.

III. PROJECT SCOPE OF WORK

The proposed Citizen Service Management System shall be enhanced to ensure efficiency, responsiveness, and accountability in managing citizen concerns. It will be equipped with the following features and capabilities:

1. Licenses

- a) The system will include 88 licenses of Dynamics 365 Customer Service, 88 licenses of Microsoft 365 Business Basic, and 1 license of Power BI (upgrade from Professional to Premium Subscription) for reporting and data analysis.
- b) The system will allow the Quezon City Government to "procure additional licenses" as necessary, ensuring scalability.

2. System Modifications

- a) Modifications to the existing CRM system will include enhancements to improve case management, reporting, and communication across departments and external platforms.
- b) Integration of Request for Action (RFA) Form: The RFA form will be fully integrated into the CRM to standardize incident and nonconformity reporting, improving tracking and accountability.
- c) Automated and Additional Fields for Case Forms and Dashboard Reporting: To enhance data accuracy and streamline the reporting process, fields such as Case Number, Incident Date, District Field, and Account Type will be automated. In addition, new fields (e.g., the number of vehicles in a road accident or the number of establishments in a fire) will be added to capture more detailed incident data. This comprehensive data will be automatically populated and reported in a dashboard format for quick and clear incident overviews, ensuring efficient analysis and prompt responses.

3. Automated Fields

- a) Case Number: Automatically generate unique identifiers for each incident.
- b) Incident Date: Auto-capture the date of the incident.
- c) District Field: Automatically populate based on the selected Barangay.
- d) Account Type: Automatically capture Voice Account for Calls and Non-Voice Account for Emails and Social Media submissions.

4. Suggested Text & Dropdown Lists

- a) Case Title/Process: Predefined text suggestions will be available to improve accuracy and speed.
- b) Incident Classification: Automated classification options will streamline case categorization.
- c) Incident Type: Dropdown options such as Emergency, Non-Emergency, Police Assistance, Fire Incidents, Medical Emergencies, and more. The system will allow the dynamic addition of new incident types by authorized administrators to ensure adaptability to evolving needs.
- d) Priority Levels: Define priority levels (Low, Medium, High) for cases.
- e) Platform/Initiator: List platforms such as Radio, 122, Social Media, and Website submissions for case initiation.
- f) Department/Process Owner: Dropdown list of relevant departments and units for case assignment.
- g) Barangay: Provide dropdowns for Barangays with automatically linked districts for ease of assignment.

5. Service Level Agreements (SLAs)

- a) SLAs will define response and resolution times for various types of incidents to ensure timely handling. Metrics such as incident frequency, call duration, agent response time, and emergency handling times will be tracked.
- b) The system will flag pending tickets to remind departments of unresolved issues, with notifications sent to expedite ticket closure and ensure timely resolution of all incidents.
- c) Configuration for Ticket Closure and Monitoring Metrics: The system will include features to track metrics such as Turnaround Time, First Response Time, and Call Resolution Time. These configurations in the Dynamics 365 Customer Service Hub will support Citizen Helpline 122 in meeting service commitment standards for citizens.

- d) The monitoring tools will also contribute to the Zero Incident goal by ensuring efficient case management and reducing risks through prompt resolutions.

6. Heat-map Functionality

- a) The system will include a heat-map dashboard to visually display and track the concentration of incidents in real-time, particularly useful for managing disasters and emergencies (e.g., floods, fire incidents). This feature will provide spatial analysis to guide resource allocation and response prioritization.
- b) The heat map will display incidents by type and severity, aiding decision-makers in understanding and responding to crises efficiently.

7. Case Management across Channels

- a) The system will integrate multiple platforms such as Facebook Messenger, Website, and Email to ensure that all cases raised through different communication channels are captured, logged, and addressed in a unified system. Cases raised via these platforms will be routed through the same CRM system, ensuring they are tracked and resolved under a single platform.

8. Workflow Mapping Customization

- a) Custom workflows will be implemented, allowing the system to automatically route cases based on specific criteria such as incident type, priority, and department. These workflows will ensure cases are escalated or reassigned to relevant departments for resolution.
- b) Include unique workflows for DRRM (Disaster Risk Reduction and Management) and BPLD (Business Permits and Licensing Department) to address their specific needs.
- c) The system will include functionality to expedite ticket closures, ensuring timely resolution of all incidents.

9. ISO Documentation and Reporting

- a) The system will provide standardized reports in line with ISO documentation requirements. The Request for Action (RFA) report format will replicate the RFA form for accurate documentation and ISO compliance.
- b) Reporting will include case summaries, departmental reports, and a detailed breakdown of incidents handled, along with analytics on resolution times, ticket aging, and departmental performance.

10. Report Generation Formats

- a) QCCSD Incident Report: A concise summary for critical case review.
- b) Departmental Report: Detailed reports for in-depth departmental analysis.
- c) RFA Form Report: A detailed replication of the RFA form for ISO compliance.
- d) Heat-map Analysis Reports: Visual reports based on the heat-map data, tracking high-risk zones and response effectiveness.

11. Reminders and Alerts

- a) The system will include automated reminders and alerts for pending or overdue tickets, ensuring that no case is forgotten or left unresolved. These alerts will assist departments in maintaining SLA compliance and ensuring swift resolutions.

12. User Management and Security

- a) The system will include role-based access control (RBAC) to ensure secure data access and management across departments. Only authorized users will have access to certain cases and functionalities, protecting citizen information.
- b) A logging and auditing system will be in place to track all actions taken within the system, ensuring transparency and accountability.

13. Subscription Inclusions

- a) The subscription includes software maintenance, updates, and security patches. It will also cover training for relevant staff to ensure proper system use and data management.
- b) The subscription service will include annual support, covering bug fixes, feature enhancements, and security patch updates on a quarterly basis, or more frequently if critical security issues arise.

14. Provision of Documents

- a) The solution provider shall deliver complete documentation for the deliverables, including but not limited to:
 - 1) Information System/Application system source code and associated libraries
 - 2) User Manuals
 - 3) Technical/Reference Manual
 - 4) System/Operational Manual
 - 5) Troubleshooting and Installation Guides
- b) Documentation must be provided in editable formats (e.g., Microsoft Word) and non-editable formats (e.g., PDF) and delivered to the Local Government of QC. The QC Government reserves the right to reproduce these documents at no additional cost. All intellectual property developed or created as part of this project shall become the sole property of the QC Government, including the source code, which will be available for any necessary system adjustments.

IV. AREA OF COVERAGE

The Local Government Unit (LGU) of Quezon City, governing the largest city in Metro Manila by land area and population, will implement the Customer Relationship Management (CRM) system modifications across all 142 barangays of Quezon City. These enhancements will ensure seamless coverage of the entire city, improving incident tracking, case management, and integrated communication across departments.

Additionally, key departments such as the Quezon City Disaster Risk Reduction and Management (QCDRRM) office and the Business Permits and Licensing Department (BPLD) will be equipped with unique workflows tailored to their specific operations. This ensures effective disaster response and efficient handling of business-related concerns. The modified system will also handle inter-jurisdictional coordination, extending its functionality to neighboring cities as required, thereby providing a comprehensive and scalable solution for all stakeholders.

V. PROJECT STANDARDS AND REQUIREMENTS

A. Track Record

1. The system software provider/supplier must have completed a similar project within the past three years, with a project value of at least 50% of the Approved Budget for the Contract (ABC) for this project.
2. The provider/supplier must demonstrate a good track record and submit the organizational structure, manpower schedule, and details of functions and duties, along with relevant certifications, as part of the Project Implementation Plan (PIP).

B. Organization

1. The system software provider/supplier must deliver the solution using cloud-based Customer Relationship Management (CRM) services. The modifications will enhance the existing CRM system used for managing citizen interactions with the City Government.
2. The system software provider/supplier must be a certified distributor or manufacturer of the software being used for the modifications.
3. The system software provider/supplier must submit a statement ensuring non-disclosure of the agency's data.
4. The system software provider/supplier must provide warranty statements that include on-site services to address technical support needs in a timely manner, as well as phone or email technical support services for twelve (12) months from the project completion date.

C. Manpower

1. The system software provider/supplier must provide a minimum of the following personnel for the enhancement and modification of the existing system:
 - a) 2 Consultants
 - b) 2 Developers
 - c) 1 Project Manager
 - d) 1 Technical Consultant

D. Training and Area of Coaching

1. The system software provider/supplier shall deliver training, area coaching, and orientation programs for users of the enhanced system. The training will cover:
 - a) Contact Center Agents/Admin Staff: 60 trainees in batches.
 - b) Department/Office/TF Heads: 120 trainees.
 - c) Contact Center System Administrator/MIS Staff: Specific number to be determined based on need.
 - d) System/Tech Personnel: Specific number to be determined based on need.

VI. PROJECT DURATION

This project shall be implemented with the following target days per milestone. Delivery period for the project shall be ninety (90) calendar days.

MILESTONES	CALENDAR DAYS
Project Preparation and Mobilization	15 calendar days upon Receipt of Notice to Proceed
Process Mapping, Technical Specifications Sign-Off	12 calendar days
Application Programming & Development to Minimum Viable Product	60 calendar days
UAT	2 calendar days
Training and Handover	1 calendar day
Project Support	12 months from handover date

VII. APPROVED BUDGET FOR THE CONTRACT

- A. The Approved Budget for the Contract (ABC) is **Seven Million Three Hundred Fifty Thousand Two Hundred Fifty Eight Pesos (PHP 7,350,258.00)** with deliverables and listed complete details specified in Section III, Project Scope of Work.
- B. **NO PRICE ADJUSTMENT** - The project cost shall be fixed and there shall be no price adjustments applicable for the duration of the contract except when the operations costs are increased by more than 10% as a result of any extraordinary circumstance as IDENTIFIED by the National Economic Development Authority (NEDA). Pursuant to the provisions of RA 9184 and its IRR on contract price escalations, all contract price escalation shall be approved by the Government Procurement Policy Board (GPPB).

VIII. BASIS OF PAYMENTS

MILESTONES	ACCEPTANCE CRITERIA	PERCENTAGE BILLING
Project Preparation and Mobilization	Process Mapped and Approved	15%
Process Mapping and Technical Specifications Sign-Off	Documentation signed-off by the end user	
Application to Programming and Development to Minimum Viable Product	Minimum viable product signed off by QA and client's authorized personnel	35%
User Acceptance Test (UAT)	Beta testing at the end user's office at the Quezon City Compound Full documentation signed off QA and client's authorized personnel	34%
Training and Handover	Signed off by client's authorized personnel	15%
Performance Security Retainer	6 months	1%
TOTAL		100%

IX. WARRANTY

The QC Service Management System for Citizen Concerns, including all modifications and enhancements, shall be free from defects in material and workmanship for a period of one (1) year from the date of final project acceptance. Free system updates related to the modifications will be provided within the warranty period. The system must meet all requirements outlined in the Terms of Reference (TOR).

X. PENALTIES FOR BREACH OF CONTRACT

Failure to deliver the services according to the standards and requirements set by the City shall constitute an offense and shall subject the service provider to penalties and/or liquidated damages pursuant to the provisions of RA 9184 and its revised Implementing Rules and Regulations.

XI. CANCELLATION OR TERMINATION OF CONTRACT

The guidelines contained in RA 9184 and its revised IRR shall be followed in the termination of any service contract. In the event the City terminated the contract due to default, insolvency, or for cause, it may enter a negotiated procurement pursuant to RA 9184 and its IRR.

Terms of Reference endorsed, reviewed and certified by:

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APPENDIX

Updated Key Features and Requirements

Incident Tracking:

- A. **System Scope:** Implement a consistent system for recording, tracking, and responding to citizen incidents.
- B. **Mobile Access:** Ensure mobile app functionality includes viewing, updating, and closing tickets, with offline capabilities.
- C. **Automation:** Include automated acknowledgements and responses upon incident logging.
- D. **Document Management:** Facilitate the creation and distribution of both standard and custom documents related to incidents.
- E. **End-to-End Management:** Provide comprehensive management from incident logging to resolution.

Data Management:

- A. **Record Storage:** Store comprehensive records including case details, allocations, and mandatory case facts.
- B. **Document History:** Maintain a complete history of all documents and interactions related to each incident.
- C. **Case Notes & Uploads:** Support the capturing of case notes and document uploads.
- D. **Case Linkage:** Enable identification and linkage of related cases.

User Interface and Experience:

- A. **Summary Views:** Provide detailed views including incident stage, tracking number, department/unit, responsible personnel, and other relevant details.
- B. **Search & Filter:** Implement robust search and filter functionalities for tickets and citizen reports.
- C. **Dashboards:** Offer customizable dashboards with real-time data monitoring and visualization.

Reporting and Analytics:

- A. **Reporting Capabilities:** Support automated and customizable reporting, including predefined and custom report options.
- B. **Dashboards:** Include a dashboard interface for flexible data visualization, both graphical and tabular.

Security and Compliance:

- A. **Secure Repository:** Ensure a secure, centralized repository for document storage with comprehensive audit trails and unalterable records.
- B. **Access Control:** Define user roles and permissions, and implement robust security protocols.
- C. **Standards Compliance:** Adhere to basic workflow standards and support no-code application development for enhanced functionality.

Process Monitoring and Workflow:

- A. **Status Tracking:** Track the status of work items, job timelines, and document creation/archival dates.
- B. **Dashboard Configuration:** Enable users to configure dashboards and generate performance reports.
- C. **Workflow Support:** Support customizable workflows and process re-engineering as needed.