

## **TERMS OF REFERENCES (TOR)**

### **PROCUREMENT OF CUSTOMER SERVICE APPLICATION**

#### **I. RATIONALE:**

The Local Government Unit of Quezon City oversees the largest city in Metro Manila in terms of both land area and population, with nearly three million residents. Given this sizable population, the city government requires a solution to manage, organize, and track citizen requests, complaints, and suggestions directed to the Office of the Mayor or relevant departments. Currently, these concerns come from various sources such as email, SMS, phone calls, and social media. However, they are manually recorded and tracked in multiple spreadsheets, if at all, and are then assigned to the appropriate department for resolution.

Although the respective offices strive to address the issues raised, there is an opportunity to implement a service management system that would enable the city government to centrally coordinate, track, and efficiently allocate resources to address the increasing volume of citizen concerns and improve responsiveness.

#### **II. PROJECT DESCRIPTION**

The project aims to deliver a citizen-centered service management system that will enable the various departments within the Quezon City Government to have a singular view of the various issues raised to their departments by citizens, take ownership of resolving cases assigned to them, and see them through to ultimate resolution.

##### **SYSTEM FUNCTIONALITIES**

The solution will serve as the centralized system for tracking citizen concerns raised to the Quezon City LGU. Each case will have a unique ticket number and require action. Cases can be submitted through existing communication channels (e.g., 122 Hotline, email, and social media) and will be logged by authorized personnel.

Key features:

- Each case is linked to a user ID when possible.
- Cases have three statuses: Active, Resolved, or Cancelled (with potential additions before UAT).
- Tracks case details, including source, date, and assigned department.
- Allows verification of existing cases or creation of new ones.
- Supports escalation, reassignment, and queuing when needed.
- Alerts departments when cases are reassigned via email/message.

### **III. PROJECT SCOPE OF WORK**

#### **TECHNICAL SPECIFICATIONS**

The proposed Citizen Service Management System shall be equipped with the following:

1. Licensing and Software Components:
  - 88 licenses to an application for customer service for case management and tracking.
  - 88 licenses to an application for communication and collaboration.
  - 1 license to an application for reporting and analytics.
2. The system shall allow the Quezon City Government to “top up” licenses as necessary, albeit at an additional cost.
3. Case Management and Tracking:
  - 3.1 Ability to log and track citizen concerns from multiple channels (Hotline 122, email, SMS, and social media).
  - 3.2 Automated case assignment and routing to the appropriate department.
  - 3.3 Case status tracking with standard categories: Active, Resolved, or Cancelled.
  - 3.4 Reassignment and escalation capabilities with automated notifications.
4. System Integration and Compatibility:
  - 4.1 Compatible with existing Quezon City Government infrastructure and Microsoft Dynamics 365.
  - 4.2 Ensures compliance with existing QC IT security policies.
5. User Access and Security:
  - 5.1 Role-based access control (RBAC) to ensure restricted access based on user roles.
  - 5.2 Audit logs for case tracking and system activity monitoring.
6. Notifications and Alerts:
  - 6.1 Automated email notifications for case updates, reassignment, and resolution status.
7. Data Management and Reporting:
  - 7.1 Power BI integration for real-time case monitoring and reporting.
  - 7.2 Standard and customizable reports for tracking response times and department performance.
8. This system will centralize case management and enhance the efficiency of the Quezon City Helpline 122 Service Management System in addressing citizen concerns.
9. Provision of Documents:

The solution provider shall deliver complete documentation for the deliverables, including but not limited to:

  - User Manuals
  - Technical/Reference Manual
  - System/Operational Manual
  - Troubleshooting and Installation Guides

Documentation must be provided in both editable formats (e.g., Microsoft Word) and non-editable formats (e.g., PDF). These documents shall be delivered to the Quezon City Government, which reserves the right to reproduce them at no additional cost.

All intellectual property developed or created as part of this project shall become the sole property of the Quezon City Government, including the source code, which must be made available for future system modifications or enhancements.

**IV. AREA OF COVERAGE**

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

**V. PROJECT STANDARDS AND REQUIREMENTS**

**A. ORGANIZATION**

1. The system software provider/supplier must be a certified distributor/manufacturer of the software or brand being offered.

**VI. PROJECT DURATION**

Project duration shall be for nine (9) months upon issuance of Notice to Proceed.  
To be activated within 30-calendar day.

**VII. APPROVED BUDGET FOR THE CONTRACT**

Source of Fund:	General Fund
The Approved Budget for the Contract is:	<b>Two million eight hundred fifty thousand two hundred seventy pesos and twelve centavos only (PHP 2,850,270.12)</b>

**VIII. BASIS OF PAYMENTS**

Full payment of nine (9) months Subscription upon completion of the activation.

**IX. PENALTIES FOR BREACH OF CONTRACT**

Failure to deliver the services according to the standards and requirements set by the City shall constitute an offence and shall subject the Contractor to penalties and/or liquidated damages pursuant to RA 9184 AN ACT PROVIDING FOR THE MODERNIZATION, STANDARDIZATION AND REGULATION OF THE PROCUREMENT ACTIVITIES OF THE GOVERNMENT AND FOR OTHER PURPOSES and its revised Implementing Rules and Regulations.

**X. CANCELLATION OR TERMINATION OF CONTRACT**

Should there be any dispute, controversy or difference between the parties arising out of this TOR, the parties herein shall exert efforts to amicably settle such dispute or difference. However, if any dispute, controversy or difference cannot be resolved by them amicably to the mutual satisfaction of the parties, then the matter may be submitted for arbitration in accordance with existing laws, without prejudice for the aggrieved party to seek redress before a court of competent jurisdiction.

The guidelines 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 into negotiated procurement pursuant to section 53(d) of RA 9184 and its IRR.

**XI. WARRANTY**

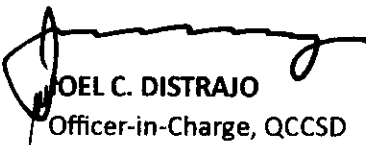
This QC Service Management System for Citizen Concerns shall be free from any and all defects in material and workmanship for a period of nine (9) months with free system update within the warranty period from date of final acceptance of the project and that same shall substantially provide under the Terms of reference (TOR)

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