TERMS OF REFERENCE (TOR)

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

I. RATIONALE:

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. RATIONALE:

The project seeks to enhance the existing Citizen Helpline 122 service management system to create a unified platform that empowers the various departments of the Quezon City Government. This upgraded system will provide a comprehensive view of all citizen requests, complaints, and concerns submitted to the city government. It will streamline the process of assigning, tracking, and resolving cases across multiple channels, ensuring that each department takes ownership of cases and sees them through to resolution.

The process begins with capturing a citizen's concern via various channels such as the contact center, social media, or email. Each concern is assigned a case or ticket number, which is routed to the appropriate department. From there, the case is managed until it reaches final resolution, whether by field officers or administrative staff. In some situations, cases may be escalated directly to the relevant department without intermediary steps.

This enhanced system will serve as the central repository for all citizen concerns and requests directed to the Office of the Mayor or any other relevant department. It will provide a singular, real-time source of truth, improving efficiency, transparency, and accountability. Additionally, the system will enable advanced data analytics capabilities, allowing the Quezon City government to derive strategic insights for continuous improvement in public service delivery.

III. PROJECT SCOPE OF WORK:

TECHNICAL SPECIFICATIONS

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**
   1.1 The system will support the following existing licenses: 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.
   1.2 The system will also support any new or additional licenses procured by the Quezon City Government as necessary, ensuring scalability.

2. **System Modifications**
   2.1 Modifications to the existing CRM system will include enhancements to improve case management, reporting, and communication across departments and external platforms.
   2.2 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.
   2.3 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**

3.1 Case Number: Automatically generate unique identifiers for each incident.

3.2 Incident Date: Auto-capture the date of the incident.

3.3 District Field: Automatically populate based on the selected Barangay.

3.4 Account Type: Automatically capture Voice Account for Calls and Non-Voice Account for Emails and Social Media submissions.

4. **Suggested Text & Dropdown Lists**

4.1 Case Title/Process: Predefined text suggestions will be available to improve accuracy and speed.

4.2 Incident Classification: Automated classification options will streamline case categorization.

4.3 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.

4.4 Priority Levels: Define priority levels (Low, Medium, and High) for cases.

4.5 Platform/Initiator: List platforms such as Radio, 122, Social Media, and Website submissions for case initiation.

4.6 Department/Process Owner: Dropdown list of relevant departments and units for case assignment.

4.7 Barangay: Provide dropdowns for Barangays with automatically linked districts for ease of assignment.

5. **Service Level Agreements (SLAs)**

SLA Category	Definition	Time Frame	Monitoring Metrics
Incident Response Time	Time taken to acknowledge and assign a reported incident.	Within 15 minutes	First Response Time
Incident Resolution Time	Time taken to fully resolve a reported incident.	24 hours (standard cases) / 4 hours (urgent cases)	Call Resolution Time,Turnaround Time
Turnaround Time Emergency Handling Time	Time taken to respond to critical emergencies (e.g., life-threatening situations)	Immediate (within 5 minutes), Response Time	Escalation Time, Escalation Time
Pending Ticket Notifications	System will flag unresolved cases and send reminders.	Every 12 hours for pending tickets	Notification Frequency
Ticket Closure Monitoring	Ensuring tickets are resolved within SLA commitments.	Daily tracking	Zero Incident Goal,Turnaround Time

6. **Heat-map Functionality**

6.1 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.

6.2 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**

7.1 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**

8.1 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.

8.2 Include unique workflows for DRRM (Disaster Risk Reduction and Management) and BPLD (Business Permits and Licensing Department) to address their specific needs.

8.3 The system will include functionality to expedite ticket closures, ensuring timely resolution of all incidents.

9. **ISO Documentation and Reporting**

9.1 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.

9.2 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**

10.1 QCCSD Incident Report: A concise summary for critical case review.

10.2 Departmental Report: Detailed reports for in-depth departmental analysis.

10.3 RFA Form Report: A detailed replication of the RFA form for ISO compliance.

10.4 Heat-map Analysis Reports: Visual reports based on the heat-map data, tracking high-risk zones and response effectiveness.

11. **Reminders and Alerts**

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**

12.1 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.

12.2 A logging and auditing system will be in place to track all actions taken within the system, ensuring transparency and accountability.

13. **Provision of Documents**

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

A. Information System/Application system source code and associated libraries
B. User Manuals
C. Technical/Reference Manual
D. System/Operational Manual
E. Troubleshooting and Installation Guides

13.2 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.

14. **Web Hosting, Cybersecurity, SSL Management, and Data Privacy**

To ensure the secure and reliable operation of the system, the solution provider must implement best practices in web hosting, cybersecurity, SSL management, and data privacy compliance. Additionally, security responsibilities and compliance measures shall be shared between the solution provider, the hosting service, and the QC Government to uphold industry standards and regulatory requirements.

14.1 Web Hosting and Infrastructure

A. The system must be hosted on a high-availability infrastructure that meets government standards for uptime, disaster recovery, and data redundancy.

B. Hosting solutions must support scalable cloud environments with load balancing and redundancy to prevent service disruptions.

14.2 Cybersecurity Measures

The system must integrate industry-standard security controls, including:

A. Multi-layered security features such as firewalls, intrusion detection/prevention systems (IDS/IPS), and real-time threat monitoring.
B. DDoS protection and mitigation mechanisms to ensure uninterrupted service availability.
C. Role-based access control (RBAC) to enforce security policies and limit access based on user responsibilities.

The solution provider shall conduct regular security audits, vulnerability assessments, and penetration testing to ensure compliance with cybersecurity standards. Additionally, the solution provider will also provide resolution to the vulnerability assessment reports conducted by outside parties that are authorized by QC LGU. This includes those conducted by national agencies like the Department of Information and Communications Technology (DICT) or other third parties with which QC LGU engages.

14.3 SSL Management

A. The system shall enforce Transport Layer Security (TLS 1.2 or higher) for all data transmissions.
B. SSL/TLS certificates must be regularly updated and monitored to prevent security vulnerabilities.

14.4 Data Privacy and Compliance

The system must comply with the Data Privacy Act of 2012 (RA 10173) and other applicable data protection regulations.

14.5 1 Security configurations must include:

A. Data at Rest: Encryption compliant with recognized industry standards (e.g., AES-256 or FIPS 140-2).
B. Data in Transit: Secure communication protocols such as TLS, SSL, and IPSec encryption to protect sensitive data.
C. Role-based access controls (RBAC) shall be implemented to ensure only authorized personnel can access or modify sensitive data.

14.6 Shared Security Responsibilities

The QC Government shall retain full ownership of all data stored within the system, while cybersecurity, privacy, and data protection shall be a shared responsibility between the solution provider and the hosting service.

14.6.1 The solution provider shall configure and enforce security controls, including:

A. Multi-Factor Authentication (MFA) to enhance user authentication security.
B. Security roles and permissions to regulate access based on user responsibilities.
C. Continuous threat monitoring and automated security alerts to proactively address security risks.

(Item 14 (14.1-14.5) referred to the TOR "Procurement of Customer Service Application" of the Ticketing System Subscription)

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 Office (QCDRRMO) and the Business Permits and Licensing Department (BPLD) will be equipped with unique workflows tailored to their specific operations, ensuring 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, providing a comprehensive and scalable solution for all stakeholders.

To maintain system reliability across all covered areas, the implementation includes continuous software maintenance, security updates, and technical support. Regular user training will ensure effective system use and data management. Annual support services will cover bug fixes, feature enhancements, and security updates to sustain seamless city-wide operations.

V. LICENSE STANDARDS AND REQUIREMENTS

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).

A. 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.
5. The system software provider/supplier must be duly registered under the National Privacy Commission

B. 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

Minimum Qualifications:

i. **Two (2) Functional Consultant** should have a minimum of three years of hands-on experience with Dynamics 365. This experience should include a thorough understanding of the platform's functionalities and capabilities. The qualifications should align with the specific requirements of Dynamics 365, ensuring that the consultant's expertise is well-suited to meet the needs of this platform.

ii. **Two (2) Developer** should have a minimum of three years of hands-on experience with Dynamics 365. This experience should include a deep understanding of the platform's development environment and capabilities. The qualifications should align with the specific requirements of Dynamics 365, ensuring that the developer's expertise is well-suited to meet the needs of this platform.

iii. **One (1) Project Manager** should have a comprehensive understanding of project management requirements and capabilities related to Dynamics 365. The qualifications should align with the specific needs of Dynamics 365, ensuring that the project manager's expertise is well-suited to oversee successful implementations. Additionally, the project manager should hold a degree, demonstrating a strong educational foundation and commitment to excellence in the field.

iv. **One (1) Technical Consultant** have at least ten years of experience in the IT industry, demonstrating a broad and deep understanding of technical solutions and requirements, particularly those related to Dynamics 365. Their extensive background should ensure they can provide expert technical support and guidance tailored to the platform. Additionally, the technical consultant should hold a degree, reflecting a strong academic foundation and a commitment to excellence in their field.

C. Training and Area of Coaching

1. The service provider will provide the equivalent of four (4) total hours of training, focus on understanding the core feature within the "Customer Service" including ticket creation, assignment, escalation, while also familiarizing with the key navigation and customization options within the platform. 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 upon issuance of notice to proceed.

MILESTONES	CALENDAR DAYS
Project Preparation and Mobilization	15 calendar days upon Receipt of Notice to Proceed
Process Mapping, Technical Specifications Sign-Off	2 calendar days
Application Programming & Development to Minimum Viable Product	60 calendar days
User Acceptance Test (UAT)	2 calendar days
Training and Handover	1 calendar day
Project Support	6 months from handover date

VII. APPROVED BUDGET FOR THE CONTRACT

Source of Fund: **Local Disaster Risk Reduction and Management Fund**

The Approved Budget for the Contract is: **Seven million three hundred fifty thousand two hundred fifty eight pesos only (PHP 7,350,258.00)**

VIII. BASIS OF PAYMENTS

MILESTONES	ACCEPTANCE CRITERIA	PERCENTAGE BILLING
Project Preparation and Mobilization Process Mapping, Technical Specifications Sign-Off	Process Mapped and Approved Documentation signed-off by the end user	**15%**
Application Programming & 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	**35%**
Training and Handover	Signed off by client's authorized personnel	**15%**
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:

Prepared by:

JOEL C. DISTRAJO
OIC, QCCSD

Enp. MA. BIANCA D. PEREZ, MPA
Officer In Charge, QCDRRMO

MARY ANN G. CRUZ
Officer in Charge, ITDD

Noted by:

MICHAEL VICTOR N. ALIMURUNG
City Administrator

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.