



TERMS OF REFERENCE (TOR)

I. Proponent Office	Corporate Planning Department
II. Title of the Study	2017 Client Awareness and Satisfaction Survey
III. Background & Rationale	The overall goal of the Corporation is to ensure an optimal level of awareness, knowledge, and satisfaction of members on PhilHealth benefits and services. For the past years, PhilHealth employs the Social Weather Station (SWS) Survey as the means for generating data for member satisfaction and awareness. Same with the survey (PhilHealth Stakeholders Survey) conducted last 2016; this year's intends to produce evidence looking at a much wider scope and disaggregated information for member satisfaction to generate a more robust data. The questions will touch on the respondent's knowledge of PhilHealth, membership coverage, awareness of their PhilHealth benefits and their satisfaction with the current benefits and services of PhilHealth. Also, it will look into the sources of information of each membership category allow PhilHealth determine the appropriate touch points to increase awareness and market its benefits and services.
VI. Objectives	<p>A. Main Objective</p> <p>The study aims to determine the levels of satisfaction and awareness of members on PhilHealth benefits and service delivery position.</p> <p>B. Specific Objectives</p> <ul style="list-style-type: none"> • Determine the satisfaction level across membership categories and geographic areas; • Determine the level of awareness across membership categories and geographical areas; • Identifying current and preferred sources of information, benefits and services of members across membership categories and geographical areas; and • Identify potential sources of dissatisfaction and information barriers.
V. Scope of Work	<p>TA Provider – Responsibilities</p> <ol style="list-style-type: none"> 1. Submit a full proposal including budget requirement for the survey. 2. Provide the most acceptable and appropriate estimation methodology. 3. Identify indicators/Pilot test/Finalize Survey Questionnaires. 4. Conduct Field Data Gathering/Survey.

	<p>5. Process and Analyze data.</p> <p>6. Conduct presentations of project findings in meetings and other fora upon the request of PhilHealth, provided that funds for these presentations will not be part of the research project budget.</p>
<p>VI. Target Population/ Geographical area to be covered</p>	<p>Nationwide survey</p>
<p>VII. Expected Outputs/ Deliverables</p>	<p>The proponent shall prepare and submit the following:</p> <ol style="list-style-type: none"> 1. Research Proposal. The Principal Investigator shall prepare a detailed research proposal, inclusive of conceptual framework which will serve as project inception report. It includes the following but not limited to: <ol style="list-style-type: none"> i. Identified target output; ii. Formulated Survey Questionnaires; iii. Detailed plan/scheme of data gathering; agreed estimation methodology; iv. Proposed project timetable. 2. Progress Report - Description of progress (technical) including problems encountered; planned activities for the ensuing 4 months. Two (2) reports shall be submitted: <ol style="list-style-type: none"> i. One month after the startup; ii. One month after completion of data gathering. 3. Draft Manuscript. A draft manuscript of the study covering research objectives, methodology, and preliminary result of collected and validated data. 4. Final Report. The final report shall be submitted within thirty (30) business days of the acceptance of the draft manuscript. The Final Report must be camera- and print-ready, fully designed, technically edited documents (printed and digital copies) in English with charts, pictures and diagrams all in high-resolution, if applicable. Likewise it shall include the following: <ol style="list-style-type: none"> i. Background of the study ii. Socio-demographic of the study respondents iii. Results of the PhilHealth module: <ol style="list-style-type: none"> a. Evaluation and analysis b. Cross tabulation results of the questions iv. Annexes <ol style="list-style-type: none"> a. Questions items b. Summary tables c. Primary data tables d. Technical details e. Others 5. Raw and processed data in excel form <p>Note that the specifications of deliverables shall be provided by PCHRD.</p>
<p>VIII. Duration of the Contract</p>	<p>The Provider must be engaged within the period of twelve (12) months upon signing of the MOA (Memorandum of Agreement).</p>

IX. Project Management	<p>A. Contact Person</p> <p>LEMUEL T. UNTALAN Senior Manager Corporate Planning Department Philippine Health Insurance Corporation Tel no. 633-2429</p> <p>MERLITA M. OPEÑA Chief Science Research Specialist Research Information, Communication & Utilization Division Philippine Council for Health Research and Development Department of Science and Technology Tel no. 837-7534 loc. 203</p> <p>B. Project Management</p> <p>The Principal Investigator shall lead the management of this research project in consultation with Philippine Council for Health Research and Development.</p> <p>C. Reporting Obligation, Notices, and Approval Process</p> <ol style="list-style-type: none"> 1. The Principal Investigator (PI) shall coordinate closely with PCHRD throughout the duration of the engagement. 2. The PI shall periodically update PCHRD on the progress of work. 3. PCHRD and PhilHealth shall have the prerogative to call for a meeting anytime as warranted. The PI shall likewise make same request as deemed necessary. 4. PhilHealth shall have the primary responsibility for the acceptance of the project deliverables and processing of payment. <p>D. Responsibilities of the Principal Investigator (PI)</p> <ol style="list-style-type: none"> 1. Abide by all the terms and conditions stipulated in this engagement. 2. Be responsible for the timely provision of all outputs and conduct of activities that are necessary within the time schedule/ implementation schedule agreed upon. 3. Coordinate all activities with PCHRD. 4. Ensure that a PhilHealth employee shall be part of the research team. <p>E. Responsibilities of PCHRD</p> <ol style="list-style-type: none"> 1. Exercise supervision of the project. 2. Assume primary responsibility for the acceptance of the project deliverables 3. Facilitate coordination between the research team and Corporate Planning Department - PhilHealth / Program Manager. 4. Make prompt reviews and recommendations for revisions of the work

	<p>produced and presented by the consultant in the different phases of the work/services.</p> <p>5. Seek feedback, inputs and recommendation from Corporate Planning Department - PhilHealth / Program Managers on the work produced and presented by the PI when deemed necessary.</p>																								
<p>X. Propriety Rights/Ownership</p>	<p>All intellectual properties resulting from the PROJECT shall be governed by Republic Act 10055 or the Technology Transfer Act of 2009 and its Implementing Rules and Regulations. Finals results of the study may be published provided that:</p> <ol style="list-style-type: none"> The required report has already been approved by PhilHealth Due recognition will be given to PHILHEALTH and PCHRD for the role and participation in carrying out the research (e.g publications, oral presentations) PhilHealth shall be given copies of the Published Reports. 																								
<p>XI. Desired Qualification of Proponent</p>	<p>A. Survey Firm</p> <p>The survey should possess the following:</p> <ol style="list-style-type: none"> Technical capability and logistical capacity to perform a nationwide survey on government services; Be at least 5 years in operation; Have a proven record of timely and quality work; Have a team of qualified researchers in Economics, Political Science, Sociology, and Statistical Analysis; Have good reputation with its clients. <p>Shortlisting Criteria</p> <table border="1" data-bbox="545 1199 1287 1388"> <thead> <tr> <th>Criteria</th> <th>Weight %</th> </tr> </thead> <tbody> <tr> <td>Experience*</td> <td>60</td> </tr> <tr> <td>Education and/or Training*</td> <td>35</td> </tr> <tr> <td>Current Capacity</td> <td>5</td> </tr> <tr> <td>Total</td> <td>100</td> </tr> </tbody> </table> <p>* Based on Desired Qualification of PhilHealth</p> <p>Technical Evaluation Criteria</p> <table border="1" data-bbox="545 1526 1287 1791"> <thead> <tr> <th>Criteria</th> <th>Weight %</th> </tr> </thead> <tbody> <tr> <td>Consistency with objectives</td> <td>30</td> </tr> <tr> <td>Methodology</td> <td>35</td> </tr> <tr> <td>Timeline</td> <td>10</td> </tr> <tr> <td>Qualification*</td> <td>20</td> </tr> <tr> <td>References</td> <td>5</td> </tr> <tr> <td>Total</td> <td>100</td> </tr> </tbody> </table> <p>* Based on Desired Qualification of PhilHealth</p>	Criteria	Weight %	Experience*	60	Education and/or Training*	35	Current Capacity	5	Total	100	Criteria	Weight %	Consistency with objectives	30	Methodology	35	Timeline	10	Qualification*	20	References	5	Total	100
Criteria	Weight %																								
Experience*	60																								
Education and/or Training*	35																								
Current Capacity	5																								
Total	100																								
Criteria	Weight %																								
Consistency with objectives	30																								
Methodology	35																								
Timeline	10																								
Qualification*	20																								
References	5																								
Total	100																								

Approved by:

LEMUEL T. UNTALAN
Senior Manager
Corporate Planning Department
Philippine Health Insurance Corporation

Noted by:

MERLITA C. OPEÑA
Chief Science Research Specialist
Research Information, Communication & Utilization Division
Philippine Council for Health Research and Development
Department of Science and Technology