



Orientation on the Harmonized Client Satisfaction Measurement for GOCCs, SUCs, and other HEIs

SEPTEMBER 19-21, 2023

RESPONSES TO THE QUESTIONS ASKED DURING THE CONDUCT OF THE ORIENTATION ON THE HARMONIZED CSM

QUESTION	ANSWER
A. DETERMINING THE SAMPLE SIZE	
<i>1. How can we determine the minimum number of respondents per service for the CSM?</i>	The agency should utilize the sample size calculator, which can be accessed through the following link: tinyurl.com/CSMsamplesize . You may use the historical transaction data from the previous year as initial baseline.
<i>2. What should be done if the actual number of respondents falls short of the minimum number required according to the given calculator?</i>	<p>The agency should develop and implement strategies to ensure that they meet the minimum number of respondents as prescribed by the Sample Size Calculator.</p> <p>For one, agencies can backtrack and email clients with previously completed transactions within the year the link to the online CSM forms.</p>
<i>3. Is it possible to use as reference the number of respondents from our last CSS?</i>	The total number of transactions, and not the respondents, should be the basis in computing the minimum number of respondents for the harmonized CSM.
B. MODIFYING THE CSM QUESTIONNAIRE	
<i>1. Is it possible to shorten the set of questions prescribed by ARTA? Based on our experience, the questionnaire for the clients is quite lengthy and takes a long time to answer. Also, is there a Tagalog version of the questions?</i>	The agency may shorten the prescribed questions but must ensure that the essence of the eight (8) Service Quality Dimensions is still captured. There is a prescribed questionnaire in English and Tagalog versions that is annexed to ARTA Memorandum Circular No. 2023-05 or the <i>Amendment to the Guidelines of the Harmonized Client Satisfaction Measurement</i> .
<i>2. Should we still include the three (3) questions regarding the Citizen's Charter? Can we modify the demographic questions based on the agency's specific needs?</i>	<p>It is mandatory to include questions related to the Citizen's Charter. The agency may choose to rephrase these questions but should retain their essence. As for the demographic questions, the agency has the flexibility to select the questions they deem necessary.</p> <p>Data fields requiring personal information such as name and contact number must be optional and cannot be required from clients.</p>
<i>3. If modifications were made to the prescribed questionnaire, is ARTA's approval required before</i>	The agency need not obtain approval on the CSM questionnaire from ARTA, as long as it retains the three (3) questions related to the Citizen's Charter,

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<i>the agency can use the revised version?</i>	includes the eight (8) Service Quality Dimensions (SQDs) and SQD 0, and incorporates the open-ended question. Furthermore, the updated CSM tool should be submitted as an annex to the CSM Report for documentation.
<i>4. What if the other Service Quality Dimensions do not apply to the service availed by the client? Is it permissible to exclude them from the questionnaire?</i>	The inclusion of all eight (8) Service Quality Dimensions (SQDs) should be maintained in the questionnaire. However, if a specific SQD is not applicable to the service availed, the client may choose to mark the N/A (Not Applicable) option.
<i>5. Is it allowed to include additional questions in the CSM, or should we strictly adhere to the required questions related to the Service Quality Dimensions (SQDs) and awareness of the Citizen's Charter?</i>	While it is generally recommended to focus on the required questions related to the SQDs and Citizen's Charter awareness, there is some flexibility to include additional questions in the CSM. However, it should be noted that the questionnaire must be answerable in five (5) minutes or less.
<i>6. We are also implementing the ISO 9001 Quality Management System and it requires a feedback mechanism. Is it possible to incorporate it with ARTA's CSM?</i>	The agency may incorporate the feedback mechanism required under the ISO 9001 Quality Management System into the CSM tool, as long as it adheres to the guidelines stated in Memorandum Circular No. 2022-05.
<i>7. Can the agency include a checklist of external services in the survey form to assist respondents?</i>	Yes, a checklist of external services may be attached.
C. IMPLEMENTATION OF THE HARMONIZED CSM	
<i>1. Is it necessary to collect and compute the CSM forms on a quarterly basis?</i>	The agency will determine the manner and schedule of collecting survey questionnaires from its offices. For ARTA, only the annual result is required.
<i>2. Is client participation in the CSM questionnaire mandatory?</i>	Participation in the CSM questionnaire is not mandatory for clients. However, it is important to give all clients the opportunity to answer the survey if they wish. While there may be clients who are in a hurry or prefer not to answer, it is crucial that they be made aware of the option to provide feedback through the CSM tool.
<i>3. Is it allowed to engage a third-party service provider for the implementation of CSM, including tasks such as result consolidation, data interpretation, and report creation?</i>	The agency may have the option to enlist the services of a third-party provider although this is not a requirement even for GOCCs under GCGs.

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<p>4. When is the appropriate time to provide the CSM tool to the client? In cases where the service involves a financial claim that undergoes multiple office processes, should the CSM tool be administered at each office or provided during the final stage, such as the payment of the financial claim?</p>	<p>The CSM tool will be provided to the client upon completion of the transaction, specifically when the final step of the service, as outlined in the Citizen's Charter, has been fulfilled.</p>
<p>5. Should we also provide the CSM form for the release and receipt of documents and other communications?</p>	<p>If it is a service being offered by the agency to external clients or internal clients (i.e., employees, units/offices within the agency) then it must be subject to CSM.</p>
<p>6. How many times should a CSM be administered to a client who availed multiple transactions for a single service?</p>	<p>A client who completed multiple transactions for a single service simultaneously may be requested to accomplish a single CSM to cover for all the transactions completed for that day. 'Transaction' is considered different from 'Service' since a client can have multiple transactions for a single service.</p> <p>For example, if a liaison officer facilitates the registration of multiple products with a regulatory agency, he may accomplish one (1) CSM for that service availed from that agency.</p>
<p>7. Given that the Joint GCG-ARTA Memorandum Circular was disseminated to GOCCs on April 27, 2023, should we still use the survey form for services that were availed before this date? Is it possible for ARTA to be more flexible regarding the coverage period of the implementation of the harmonized CSM?</p>	<p>For past completed transactions within the year that were not yet subjected to the CSM, agencies are advised to backtrack and reach out to their clients through proper and official channels, such as via email or phone call, to conduct the CSM and document the process accordingly. If this is not possible, agencies must provide justification on their CSM report as to why they failed to cover certain period or to reach their target sample size, along with proof that all proper means were exhausted.</p>
<p>8. Is it possible to utilize the same CSM tool for internal services?</p>	<p>The prescribed CSM tool applies to both external and internal services.</p> <p>The questions pertaining to Citizen's Charter awareness and Service Quality Dimensions are relevant even in the context of internal services. Therefore, the same tool should be employed for evaluating the delivery of the agency's internal services. In cases where the client believes that a particular Service Quality Dimension is not applicable to the service they have availed, they have the option to select "N/A" from the choices.</p>

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9. When a representative submits the requirements for a specific service on behalf of a client, who should complete the CSM tool? Is it the representative or the actual client who is availing the service?	The CSM tool should be filled out by the representative because they have the experience of transacting with the agency firsthand.
10. Can the third-party provider conduct the survey for remote clients by reading the questionnaire to the respondent over the telephone?	Yes, the third-party provider can employ this method using the prescribed CSM questionnaire.
11. Can ARTA suggest a specific division or department within the agency that should be responsible for conducting the survey and preparing the report?	It is up to the agency to decide which office should take the lead in consolidating results, analyzing data, and drafting the report.
12. Are the requirements for the CSM in PBB reporting the same as with those prescribed by ARTA?	Yes. The submission of the CSM as prescribed by ARTA is one of the new agency accountabilities for 2023 PBB.
D. SUBMISSION AND REPORTING OF CSM RESULTS	
1. Regarding the CSM Report, should we exclusively include the results from the revised version of the questionnaire, or should we also incorporate data from our previous tool?	The CSM Report should incorporate the results of the SQDs obtained from both the previous CSM tool implemented by the agency and the revised questionnaire. Additionally, the narrative report should provide an explanation and justification as to why the agency was unable to implement the harmonized CSM throughout the year.
2. Can the overall rating be influenced by the agency's inability to meet the minimum respondent requirement?	Not achieving the specified number of respondents without a valid justification will affect the overall rating of the agency. It will also be a ground for non-compliance.
3. Is it possible to extend the deadline for the submission of the CSM results to the following year?	For the calendar year 2023, the report must be submitted to the Authority on the last working day of April 2024 for all agencies, except Government-Owned or -Controlled Corporations, which are required to submit the CSM Report by 15 April 2024.
4. What measures can agencies implement to safeguard the integrity of CSM result data submitted to the Authority and prevent manipulation?	Agencies can establish internal protocols to restrict access to the data to a select few individuals. They may also conduct their own data verification and validation. Furthermore, it's important to note that ARTA shall request the raw data if any inconsistencies are detected in the submitted information, including during spot-checking and backchecking processes. This ensures an additional layer of verification and accountability.

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	The agency should also take note that the CSM Report must be signed by the head of the CART prior to its submission to the Authority.
5. Can the respondents be grouped according to the department to whom they had a transaction instead of the specific services availed?	Each department can administer the CSM for the services they handle. Remember that the CSM is per service basis rather than per office basis.
E. GCG's PERFORMANCE SCORECARD	
1. Will one CSM survey satisfy both the ARTA and GCG requirements?	Yes. The JMC No. 01, series of 2023 outlines that GOCCs under the GCG shall also adopt and implement the CSM in accordance with the prescribed guidelines by ARTA.
2. For the CSM implementation for FY 2024, which encompasses both external and internal services, will the GOCC's Performance Scorecard for CSM consider only the external services?	Yes, the GOCC's Performance Scorecard shall consider only the external services. Specifically, the percentage of respondents who have rated "Agree" and "Strongly Agree" for Service Quality Dimension 0 (SQD 0) within external services will be used for the CSS measure in the GOCC's Performance Scorecard.
3. Since a quarterly monitoring report (PES) is required to be submitted to the GCG, how will the CSM 4 th Quarter report be reflected or included?	The GOCC may reflect the result of CSM for its external clients in its 4th Quarter Monitoring Report and/or Annual Performance Report.
4. When will GOCCs receive a Zero rating in the CSM component of the Performance Scorecard?	The GCG may assign a zero rating in cases of (1) non-compliance with the ARTA-prescribed methodology and questionnaire, (2) the discovery of adverse findings during spot-checking or backchecking, (3) late submission of the CSM report, or (4) when the CSM rating falls below 80 percent.
5. Will agencies still need to adhere to the 80% minimum requirement for the CSS rating set by ARTA, even if the agency has obtained a GCG-approved CSS rating of 90% in 2023?	Agencies should aim for at least a satisfactory rating, or 80 percent, in their CSM results that will be reported to ARTA. That said, the GCG will maintain the 90 percent target rating within the Performance Scorecard for the CSS rating using this formula: $(\text{Actual/Target}) \times \text{Weight, if below 80\%} = 0$
6. For agencies with three (3) customer segments/types with different weights (e.g., 5% individual, 2.5% business organizations, and 2.5% health care providers), can the agency collapse the 2.5% business organization and 2.5% health	GOCCs shall adopt the methodology in accordance with the prescribed guidelines of the ARTA M.C. No. 2022-05. The agency shall combine the weight of the sub-measures (per customer type/segment) into a single CSS measure: Percentage of Satisfied Customers.



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<i>care providers and distribute their weights to the other measures in our scorecard?</i>	