



**Philippine Retirement Authority**

**Client Satisfaction Measurement Report**  
2023 (1<sup>st</sup> Edition)



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## I. OVERVIEW

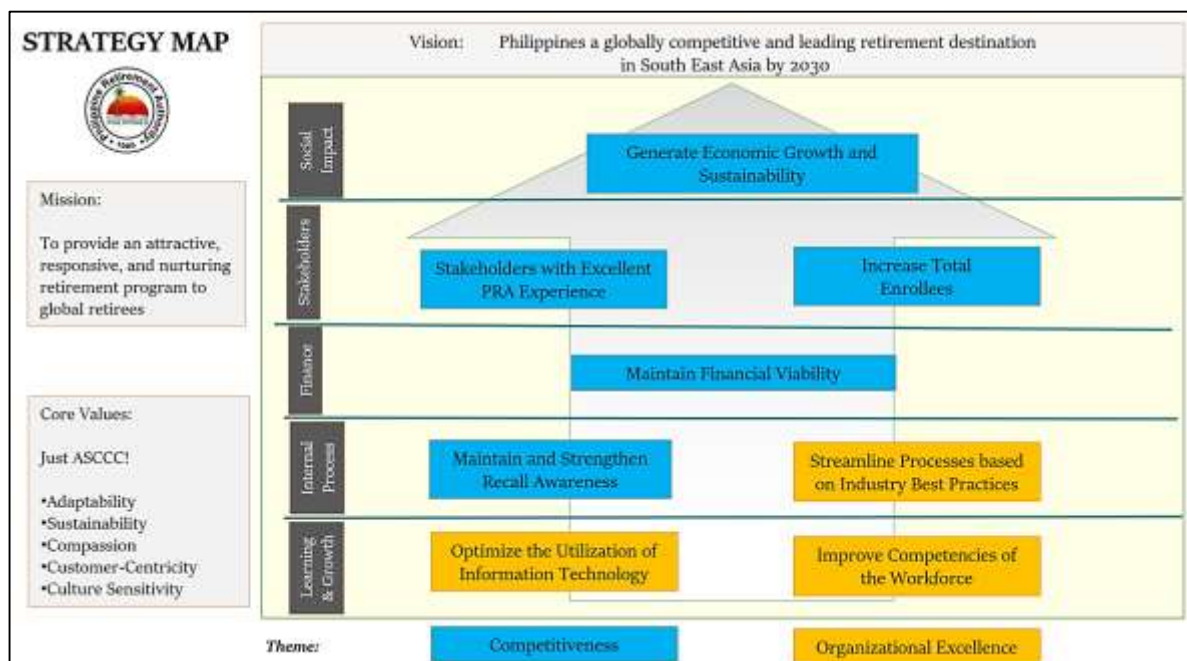
The Philippine Retirement Authority (PRA) is a government-owned-and/or controlled corporation created under Executive Order No. 1037, signed by former President Ferdinand E. Marcos on 04 July 1985. On 31 August 2001, through Executive Order No. 26, the control and supervision of PRA was transferred to the Board of Investments (BOI) – Department of Trade and Industry from the Office of the President. On 12 May 2009, Republic Act No. 9593, otherwise known as the Tourism Act of 2009, PRA became an attached agency of the Department of Tourism and was placed under the supervision of the Secretary.

PRA is mandated to develop and promote the Philippines as a retirement haven as a means of accelerating the social and economic development of the country, strengthening its foreign exchange position at the same time providing further best quality of life to the targeted retirees in a most attractive package.

The PRA is also regulated by the Governance Commission for GOCCs (GCG), through the passing of the Republic Act No. 10149 in 2011 or the Governance Act of 2011, and adopts the Performance Evaluation System (PES) framework in planning and monitoring its performance.

In compliance with the PES for the GOCC sector, PRA has updated its Charter Statements which contain the Vision, Mission, Core Values, and Strategy Map of PRA as follows:

- Vision: Philippines a globally competitive and leading retirement destination in South East Asia by 2030
- Mission: To provide an attractive, responsive and nurturing retirement program to global retirees
- Core Values: Adaptability, Sustainability, Compassion, Customer-Centricity, and Culture Sensitivity



One of the Strategic Objectives in the PRA Strategy Map is to have Stakeholders with Excellent PRA Experience, which is being measured in terms of Percentage of Satisfied Customers in the PRA’s Balanced Scorecard. A CSM is conducted and monitored annually to determine the Satisfaction Rating of PRA’s clients with the services.

Starting FY 2023, PRA’s Client Satisfaction Measurement (CSM) is implemented based on the provisions of the Anti-Red Tape Authority (ARTA) Memorandum Circular (MC) 2022-05, Series of 2022<sup>1</sup>, the GCG-ARTA Joint MC No 1, Series of 2023<sup>2</sup>, and the ARTA MC 2023-05, Series of 2023<sup>3</sup>.

The PRA accordingly implemented the CSM for FY 2023 external services with the following summary of results:

	Score
<b>CC Awareness:</b> (Total Percentage of CC1 items 1 to 3):	66.69%
<b>CC Visibility:</b> (Percentage of CC2 item 1)	69.24%
<b>CC helpfulness:</b> (Percentage of CC3 item 1)	68.42%
<b>Response Rate:</b> (Total Responses/ Total Transactions in 2023)x 100%	4.13%
<b>Overall Score</b> (Refers to the Overall Rating in Service Quality Dimensions SQD Nos. 1 to 8)	89.84%

<sup>1</sup> Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement

<sup>2</sup> Supplemental Guidelines to the ARTA MC. 2022-05 or the Implementation of the Harmonized Client Satisfaction Measurement Specific for GOCCs covered by Republic Act No. 10149.

<sup>3</sup> Amendment to ARTA Memorandum Circular No. 2022-005 or the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement



## II. SCOPE

The survey used the standard harmonized CSM questionnaire with modifications on the demographic profile questions (as cleared with the CMEO of ARTA)<sup>4</sup> to cater specifically to its respondents who are generally foreign nationals.

### a) Period Covered

With all efforts exerted in its initial year of CSM implementation, following the guidelines set by the ARTA through the three (3) issuances previously-mentioned, PRA tried to survey all clients with completed transactions for the period January to December 2023. This CSM Report, however, covers only the results of the actual responses gathered or the rating and feedback given by those who responded to the survey.

After the receipt of the GCG-ARTA Joint MC No 1, Series of 2023<sup>5</sup> on April 24, 2023, the PRA conducted the CSM survey on various dates as indicated below, utilizing two types of methods: pen and paper survey and email blasting.

Survey Gathering Method Used	Start of Conduct of Survey	Coverage	Remarks
Pen and Paper Survey	Last week of June 2023	For transactions that will be completed prospectively	Since the GCG-ARTA Joint MC No 1, Series of 2023 <sup>6</sup> was only received last April 24, 2023, PRA devised its survey tool and made a few clarifications with ARTA before starting the pen and paper survey
Email Blasting of Survey Link	November 30, 2023	For completed transactions from January up to the last day prior to the start of the pen and paper survey	<ul style="list-style-type: none"> <li>• There is a need to finalize and test the Google survey link before the email blasting; and</li> <li>• The list of contact information of clients with completed transactions for the period covered has to be generated.</li> </ul>
Re-blasting of Survey Link	January 22, 2024	All completed transactions from January to December 2023 ( with instruction to disregard the email/survey if already answered by the client/receiver)	Despite the email blasting and pen and paper survey conducted, the response rate is still low. For this reason, PRA opted to re-blast email, this time to all clients with completed transactions in 2023.

<sup>4</sup> Annex A (Final Survey Questionnaire Used)

<sup>5</sup> Supplemental Guidelines to the ARTA MC. 2022-05 or the Implementation of the Harmonized Client Satisfaction Measurement Specific for GOCCs covered by Republic Act No. 10149.

<sup>6</sup> Supplemental Guidelines to the ARTA MC. 2022-05 or the Implementation of the Harmonized Client Satisfaction Measurement Specific for GOCCs covered by Republic Act No. 10149.



## **b) Geographic and Office Coverage**

The CSM survey covers the clients who transacted with the five PRA Offices: the PRA Head Office (HO) or its four (4) Satellite Offices (SOs) in Clark-Subic, Baguio, Cebu, and Davao. Depending on the client's location/ place of residence, PRA's clients have the option to submit an application or request to any PRA Office, whichever would be more convenient to them.

Applications and client requests received through the Satellite Offices, are transmitted to the HO for processing and then reverted to the SOs for releasing. To elucidate further, while the SOs are in charge of receiving/accepting applications and other client requests, their services do not function independently nor do they stand alone. The bulk/volume in carrying out the rest of their operations is executed at the Head Office.

PRA finds it essential to note the foregoing statement in this CSM Report especially that clients who transacted with PRA are technically HO's clients, as well. The office that facilitates the CSM survey data collection depends on who will provide the last client step, which is usually the releasing of HO-processed requests/applications to clients, i.e., Satellite offices conduct the CSM survey only if they are the ones who provide the last client step. For these reasons, although the surveys were conducted at its five (5) offices, this report did not include Annexes B and C for the disaggregated data from the SOs.

## **c) List of Services Surveyed, Number of Responses, Total Number of Transacting Clients, and Sampling**

The Survey was conducted to measure the satisfaction of PRA's clients with its twelve (12) external services offered. The total number of responses gathered (1,747) as against the total number of transactions (42,272) showed a low response rate of 4.13%.

The PRA used the Sample Size Calculator provided in the ARTA MC 2022-05, Series of 2022<sup>7</sup>, which has a fixed Confidence Interval of 95% and a Margin of Error (MOE) of 5%. Using this calculator and the constant variables mentioned, the required sample size or the minimum number of respondents is computed on a "per service" basis as shown in the Table below.

In 2022, when the PRA still uses the guidelines of the GCG for Customer Satisfaction survey, the minimum sample size is 500, regardless of service availed, to represent the whole universe of clients with transactions during the year. This was not on a "per service" basis, and the results were still within the acceptable or agreed confidence level and margin of error of 95% and 5%, respectively. If the sample size is on a "per office" or the total number of respondents from the total number of transactions, the 1,747 total actual respondents out of the 42,272 population, at a 95% confidence level, only has a minimal margin of error of + 2%, which is still actually good and acceptable. PRA understands and appreciates that having the survey results analyzed on a "per service" basis can easily help PRA in identifying the services that need further improvement.

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<sup>7</sup> Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement



With the new guidelines and the low response rate, PRA finds it necessary to compute the actual margin of error (see last column), to identify the possible reasons for the low turnout on a “per service” basis as well, especially since only 3 out of the 12 services fall within the acceptable margin of error which is between 4% and 8% at the 95% confidence level<sup>8</sup>. These are Service No. 1 - Processing of SRRV Application, Service No. 2 -PRA ID Renewal, and Service No. 8 - PRA Freedom of Information (FOI) Request Process, while most of the actual margins of error for the remaining 9 services are much too high due to low number of clients who responded to the survey.

Service No.	Service Name	Number of transactions annually (2023 Actual)	Confidence Interval	Margin of Error (MOE)	Minimum number of respondents	Actual Number of Respondents	MOE based on the actual No of Responses at 95% Confidence Level <sup>9</sup>
1	Processing of SRRV Application	2,373	95%	5%	331	665	3%
2	Processing of Discontinuance of SRRV Application	107	95%	5%	84	8	33%
3	PRA ID Renewal	34,297	95%	5%	380	838	3%
4	Re-stamping of SRRV	1,516	95%	5%	307	104	9%
5	Conversion of Visa Deposit into an Active Investment	55	95%	5%	48	16	21%
6	Termination of Participation from the Retirement Program	1,093	95%	5%	284	54	13%
7	Marketer/Retirement Facility/Merchant Partner Accreditation	226	95%	5%	143	20	21%
8	PRA Freedom of Information (FOI) Request Process	15	95%	5%	14	9	7%
9	Payment of Marketer's Fee	1,399	95%	5%	302	2	69%
10	Accreditation of Banks for Visa Deposits	NONE	95%	5%	NONE	NONE	NONE
11	Bank Transfer	148	95%	5%	107	18	22%
12	Feedback Management (Complaints and Inquiries)	1,043	95%	5%	281	13	27%
<b>TOTAL</b>		<b>42,272</b>	<b>95%</b>	<b>5%</b>	<b>2,280</b>	<b>1747</b>	<b>2%</b>

<sup>8</sup> <https://www.zoho.com/survey/margin-of-error.html>

<sup>9</sup> Using Survey Monkey Margin of Error Calculator, <https://www.surveymonkey.com/mp/margin-of-error-calculator/>



Aside from the limitations remarked above in the Table for Survey Gathering Method Used, it is important to note, as well, that language barriers, and the fact that the survey was just recently introduced to its generally elderly foreign clients, who may still be unacquainted to the new survey format, the turnout of responses produced only a fraction or 4.13% of the total transactions.

Further, it is generally observed that the sudden transition in the CSM Guidelines at almost mid of the year gave PRA difficulty in reaching the clients with completed transactions during the first half of the year. Although a re-blasting was done, clients still did not respond. PRA's clients, especially members, usually transact with PRA only once a year, or after 2 -3 years. They may be occupied or could be somewhere else (within the Philippines or abroad) during the email blasting and re-blasting. Maybe, they do not open their emails, or if they do, they are not interested anymore, since the transaction happened months ago. On a per-service basis, the following reasons could be assumed:

- Clients who discontinued the application may find it irrelevant to answer the survey since they are no longer interested in the Program. The same reason could apply to services that are of the same nature such as Termination of Participation from the PRA program, and some Bank Transfer Transactions. Clients under these services are foreign nationals who could already be outside the country at the time of the email blasting and re-blasting.
- For the Service: Feedback Management, clients may opt not to answer the survey if the inquiry has been answered. More so. If the nature of feedback is a complaint, they may be disinterested in responding to the survey since the complaint itself could be a manifestation of dissatisfaction already hence clients may find it irrelevant to them to provide a rating on how good and fast PRA is in responding to complaints. They are more concerned about the resolution of the complaint itself.
- The Payment of Marketers Fees to PRA's Accredited Marketers for every successful enrollment to the program has the lowest response rate, and thus, has the highest margin of error. Since more than 80% of PRA's SRRV applications are enrolled through these marketers, they usually have several applications per day for a single service. The nature of PRA marketers is always on the go and they don't devote time to surveys. It is the first time that PRA surveyed them. Answering the survey for the months that passed, and recalling how the experience was for every transaction given that they could have a handful of them in a single day, could be extremely challenging and thus, they may opt to decline the survey instead.

Based on the above, the importance of having real-time conduct of the survey or having it answered right after the completion of the transaction contributes to a high and acceptable response rate, which, the PRA is trying to improve in the currently-ongoing CSM survey for FY 2024.

The following service had no clients in FY 2023 so "NONE" was indicated in the corresponding slot:

Client Service No. 10	Accreditation of Banks for Visa Deposits
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### III. METHODOLOGY

For physical or walk-in clients, PRA initially conducted a pen-and-paper survey that started in June 2023 in its Head and Satellite Offices. Eventually, PRA added Google online surveys via email blast to easily reach a wider base of respondents which started in November 2023 to supplement the existing mode of survey. The scoring system is based on the 5-point Likert Scale, viz:

Scale	Rating
5	Strongly Agree
4	Agree
3	Neither Agree or Disagree
2	Disagree
1	Strongly Disagree

The overall score for the 8 SQDs were computed based on the following formula:

$$\text{Overall Score} = \frac{\text{Number of "Strongly Agree" answers} + \text{Number of "Agree" answers}}{\text{Total Number of Respondents} - \text{Number of N/A answers}}$$

The interpretation of the results are as follows:

Scale	Rating
Below 60.0%	Poor
60.0%-79.9%	Fair
80.0%-89.9%	Satisfactory
90.0%-94.9%	Very Satisfactory
95.0%-100%	Outstanding

### IV. DATA AND INTERPRETATION

#### a) Demographic Profile

Of the total respondents who answered the survey, more than three-fourths (77.1%) belong to the 50-65 or higher age groups. As with sex, more than three-fourths are males while almost one-fifth are females.

The "Region of Residence", with ARTA's consent, was removed in the respondent's demographic profile since most of them are foreign retirees from different countries not familiar with the regions of the country.

Age and Sex	External	Overall Percentage
1. 19 or lower	7	0.40%
2. 20-34	70	4.01%
3. 35-49	148	8.47%
4. 50-64	679	38.87%
5. 65 or higher	668	38.24%
6. Did not specify	175	10.02%



Age and Sex	External	Overall Percentage
1. Male	1322	75.67%
2. Female	341	19.52%
3. Did not specify	84	4.81%

Of the total respondents who answered the survey, more than 49.97%, or close to half, were classified as “Not Disclosed”. Either the provided answers did not fall into any known “Nationality” class or respondents had opted out of filling out the required information. The rest of the top-ranked are Americans (15.34%), Chinese-PROC (4.60%), and British (4.06%).

The number of respondents were a mix of different nationalities who either completed their transactions relative to the SRRV program or requested information from PRA, as follows:

Nationality	External	Percentage
Afghan	1	0.06%
American	268	15.34%
Arabian	2	0.11%
Australian	31	1.77%
Austrian	3	0.17%
Bangladesh	2	0.11%
Belgian	4	0.23%
British	71	4.06%
Burkinabe	2	0.11%
Canadian	33	1.89%
Chinese (PROC)	75	4.29%
Chinese (HK-SAR)	5	0.29%
Czech	1	0.06%
Danish	6	0.34%
Deutsch	2	0.11%
Dutch	15	0.86%
Egyptian	1	0.06%
Filipino	61	3.49%
Finnish	3	0.17%
French	22	1.26%
German	30	1.72%
Indian	26	1.49%
Indonesian	3	0.17%
Iranian	2	0.11%
Iraqi	1	0.06%
Irish	8	0.46%
Israeli	1	0.06%
Italian	8	0.46%
Jamaica	1	0.06%
Japanese	45	2.58%



Nationality	External	Percentage
Jordanian	4	0.23%
Korean	40	2.29%
Lebanese	3	0.17%
Malaysian	7	0.40%
Nepalese	2	0.11%
New Zealand	5	0.29%
Norwegian	2	0.11%
Pakistani	2	0.11%
Palestinian	1	0.06%
Portuguese	1	0.06%
Singaporean	15	0.86%
Spanish	4	0.23%
Sri Lankan	4	0.23%
Swedish	2	0.11%
Swiss	27	1.55%
Taiwanese	20	1.14%
Ukrainian	1	0.06%
Vietnamese	1	0.06%
Not disclosed	873	49.97%
<b>Total</b>	<b>1747</b>	<b>100.00%</b>

For a composite of PRA's Client Type, more than half of the respondents (52.60%) are "SRRV Holders" and more than one-third (36.52%) are "SRRV Applicants". These are followed by "Representative of SRRV Members" (5.78%) and "Accredited Partners" (4.06%), to wit:

Client Type	External	Percentage
<b>External Client</b>		
SRRV Holder	918	52.55%
SRRV Applicant	638	36.52%
Accreditation Applicant	1	0.06%
Representative of SRRV Member	100	5.72%
FOI Client	9	0.52%
Accredited Partner (Marketer, RFs, and MPs)	70	4.01%
Others	11	0.63%
<b>Total</b>	<b>1,747</b>	<b>100%</b>

## b) Count of CC and SQD Results

### CC1. Awareness of the CC

More than 40% of the respondents know what a CC is and saw PRA's CC at the office followed 14.2% who only learned of the CC only when the respondent saw this office's CC



**CC2. For Visibility of the CC**

More than two-thirds of the respondents (69.24%) say that the CC was easy to see

**CC3. For Helpfulness of the CC**

More than two-thirds of the respondents (68.42%) say that the CC helped in their transaction with PRA

<b>Citizen's Charter (CC)</b>	<b>Responses</b>	<b>Percentage</b>
<b>CC1. Which of the following described your awareness of the CC?</b>		
1. I know what a CC is and I saw this office's CC.	780	<b>44.65%</b>
2. I know what a CC is but I did not see this office's CC.	137	<b>7.84%</b>
3. I learned of the CC only when I saw this office's CC.	248	<b>14.20%</b>
4. I do not know what a CC is and I did not see this office's CC.	582	33.31%
<b>CC2. If aware of CC, would you say that the CC of this office was...?</b>		
1. Easy to see	826	<b>69.24%</b>
2. Somewhat easy to see	245	20.54%
3. Difficult to see	66	5.53%
4. Not visible at all	56	4.69%
<b>CC3. If aware of CC, how much did the CC help you in your transaction?</b>		
1. Helped very much	756	<b>68.42%</b>
2. Somewhat helped	264	23.89%
3. Did not help	85	7.69%

**SQD0. Overall Results of Service Quality Dimension (SQD)**

Overall score was deemed “Very Satisfactory” at 91.85% which means that PRA’s respondents are very satisfied with its services.

<b>Service Quality Dimension (External Services)</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>N/A</b>	<b>Total Responses</b>	<b>Overall</b>
SQD 0. I am satisfied with the service that I availed.	989	601	65	38	38	16	1,747	<b>91.85%</b>

**SQD1-8 Results**

As indicated in the table, the summary of results shows that SQD7 (Assurance), defined as “the capability of the front-line staff to perform their duties, product and service knowledge, understand citizen/client needs, helpfulness, and good work relationships”, was ranked the highest in the survey (95.28%) overall. This was followed by SQD-8 (Outcome) at 93.24% and SQD-6 (Integrity) and SQD-2 (Reliability) which scored 92.91% and 92.90%, respectively.



Service Quality Dimension	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	N/A	Total Responses	Overall
SQD 1. Responsiveness	822	673	126	63	39	24	1747	86.77%
SQD 2. Reliability	959	638	74	23	25	28	1747	92.90%
SQD 3. Access and Facilities	878	636	106	56	41	30	1747	88.18%
SQD 4. Communication	781	644	156	52	43	71	1747	85.02%
SQD 5. Costs	783	652	180	60	26	46	1747	84.36%
SQD 6. Integrity	972	613	85	17	19	41	1747	92.91%
SQD 7. Assurance	1116	518	49	9	23	32	1747	95.28%
SQD 8. Outcome	956	617	69	18	27	60	1747	93.24%
<b>Overall</b>	<b>7,267</b>	<b>4,991</b>	<b>845</b>	<b>298</b>	<b>243</b>	<b>332</b>	<b>13,976</b>	<b>89.84%</b>

### c) Overall Score per Service

Overall, about 89.84% of the 13,976 responses to the survey who completed transactions, inquired, filed complaints or requested information from PRA, by and large, “Strongly Agree/Agree” with the quality of service of PRA.

External Services	Strongly	Agree	Neither Agree	Disagree	Strongly	N/A	Total	Overall
Processing of SRRV Application	3232	1717	212	61	24	74	5320	94.34%
Processing of Discontinuance of SRRV Application	17	20	7	5	8	7	64	64.91%
PRA ID Renewal	3320	2513	425	151	159	136	6704	88.81%
Re-stamping of SRRV	391	313	76	20	10	22	832	86.91%
Conversion of Visa Deposit into an Active Investment	50	40	14	8	3	13	128	78.26%
Termination of Participation from the Retirement Program	127	175	71	27	21	11	432	71.73%
Marketer/Retirement Facility/Merchant Partner Accreditation	58	93	5	1	0	3	160	96.18%
PRA Freedom of Information (FOI) Request Process	14	17	13	5	5	18	72	57.41%
Payment of Marketer's Fee	7	6	0	1	0	2	16	92.86%
Accreditation of Banks for Visa Deposits	0	0	0	0	0	0	0	N/A
Bank Transfer	32	74	13	10	8	7	144	77.37%
Feedback Management (Complaints and Inquiries)	19	23	9	9	5	39	104	64.62%
<b>Overall</b>	<b>7267</b>	<b>4991</b>	<b>845</b>	<b>298</b>	<b>243</b>	<b>332</b>	<b>13976</b>	<b>89.84%</b>

Leading the survey for those who Strongly Agree/Agree with PRA’s services are respondents who completed transactions for the “Marketer/Retirement Facility/Merchant Partner Accreditation” (96.18%) followed by those who underwent “Processing of SRRV Application” (94.34%), “Payment of Marketer’s Fee” (92.86%) and transactions for “PRA ID Renewal” (88.81%).

While the overall score is equivalent to “Satisfactory” or almost “Very Satisfactory” by a mere fraction, the PRA is still open to opportunities for improvement and needs to address comments/suggestions from its respondents about turnaround time, automation, protocols, and transparency in PRA’s policies. To name a few, the following were actual comments or free responses from the respondents on the survey:

- a) *PRA (SRRV) card has been rarely, if ever, recognized as a real government visa. There is a phone number on the card that a business can call for assistance, but when I have called that number, only occasionally can I successfully speak to a representative. Emails regarding home purchasing have also gone unanswered;*



- b) *I don't understand why the satellite office in Davao (in any satellite office) can't do the restamping directly. It seems an unnecessary and wasteful use of the Manila office's time to have to process all issues;*
- c) *Email if any changes in protocol. Had to get an exit letter or inform PRA when I returned but unbeknown to me, this rule changed and no need for it m which is good, but would have been better if informed if such a big change;*
- d) *It took too long to get my deposit back when I cancelled - 4 months from submission of cancellation and 2.5 months after the actual cancellation;*
- e) *Improve your website because I cannot find information regarding Affirmation of Membership No one will replay (sic) to emails that I have sent from the listing of available emails lists;*
- f) *Shorten the time for SRRV application and approval. Clearly describe on the website that cash only in the office. Longer time for the SRRV Card renewal, for example 3 years*

#### V. Results of the Agency Action Plan reported for FY 2022

As a GOCC under the GCG's direction, the PRA had conducted a GCG-prescribed 3rd party Customer Satisfaction Survey for FY 2022 before the implementation of ARTA MC 2022-05, series of 2022, the GCG-ARTA Joint MC No 1, Series of 2023, and the ARTA MC 2023-05. The FY 2022 CSM report concluded that "the PRA achieved the target total positive raters for the year being surveyed having recorded 80.00% which is an improvement of the last year's 76.00%."

It also recommended that PRA develop "an action plan aimed at improving the weak points this year (2022) specifically to serve as the basis for the formulation, and/or enhancement of programs, activities, and projects (PAP), action plans, strategic initiatives, relevant policies and system development of PRA".

The major action plans identified in 2022 by the Management Committee (ManCom) and carried out by concerned divisions were the following:

FY 2022 Recommendations Resulting from the CSM Survey	Action Plan/Implementation
<ul style="list-style-type: none"> <li>• Improvement in Turnaround time for Processing of SRRV Application</li> </ul>	Coordination with the Bureau of Immigration (BI) on the streamlining and automation of processes
<ul style="list-style-type: none"> <li>• Establishment of an on-line SRRV application</li> </ul>	ICTD in coordination with concerned divisions has included in its PAPs for 2023 to implement the project
<ul style="list-style-type: none"> <li>• Retooling of Satellite Offices (SO) to address weakness in processing of documents for SRRV application</li> </ul>	



FY 2022 Recommendations Resulting from the CSM Survey	Action Plan/Implementation
	In 2023, retooling of SOs along with the Processing Division were conducted to enhance efficiency of personnel
<ul style="list-style-type: none"> <li>Increasing number of cancellation of SRRV members</li> </ul>	Reintroduction of Social Integration Programs/Activities for SRRV members as part of Retention program
<ul style="list-style-type: none"> <li>Improve procedure on monitoring stakeholders inquiry/complaints received thru the PRA inquiry email</li> </ul>	A reorientation for concerned divisions was conducted by the Feedback Management Unit to address issues and concerns on the matter
<ul style="list-style-type: none"> <li>Accreditation policies/guidelines need to be reviewed</li> </ul>	An Office Order was issued with regard reorganization of the Accreditation Unit and including the need to update its policies/guidelines

## VI. Continuous Agency Improvement Plan for FY 2024

PRA's Improvement Plan for FY 2024 is anchored on the recommendations brought about by the independent study of the Philippine Institute for Development Studies on the "Competitiveness Assessment of the Philippine Retirement Authority's Program in International Retirement Migration".

PRA clustered these recommendations into categories, namely:

- Cluster A. SRRV, Marketing and Promotion
- Cluster B. Business Process Improvement
- Cluster C. Retiree-Welfare
- Cluster D. Planning and Roadmap

The results of the PIDS study are supplemented by the results of this FY 2023 CSM which emphasized the importance of Business Process Improvement in providing quality services to our clients. Accordingly, PIDS provided its recommendations to PRA under this cluster, which PRA positively adopted, as follows:

1. Reinforce the benefits of SRRV with a brand reputation of speed and timeliness in the processing and registration of applicants, ID renewal process, and cancellation;
2. Development of PRA's digital system must be fast-tracked to improve program processes and ensure regular monitoring of PRA efforts' effectiveness;
3. Empower its satellite offices to reduce visa processing time (enrolment, renewal, cancellation) and to respond more effectively to the needs of its members; and
4. Delegate main office functions to the satellite offices in the short run. Reinforcement of the satellite offices' human, physical, and technological resources is necessary.





Among the specific Business Process Improvement Action Plans for FY 2024 are as follows:

- Introduction of Electronic Visa
- Business Process Re-engineering
- SRR Visa Information and Management System
- Automation of Accounting System
- Digitalization of Financial Documents and Records

Prepared by:

**DIVINA OZAETA HERNANDEZ**

Planning Officer V/ Head of Corporate Planning Division

Noted by:

**ATTY. ANTONIO V. RIVERA**

Department Manager III - MSD

Approved by:

**ROBERTO Z. ZOZBRADO**

General Manager & CEO

Chairperson, Committee on Anti-Red Tape  
(CART)





# ANNEX A (Survey Questionnaire Used)

## 1. Pen and Paper Survey Form

Control No: \_\_\_\_\_

ANG-ANG TAN-ANGINITY  
CLIENT SATISFACTION  
REGISTRATION FORM  
PRA Form No. 1 (REV-2022-1)  
Exp. res. on 31-Jul-2023

This Client Satisfaction Measurement (CSM) survey keeps track of the customer experience of government offices. Although your response to this questionnaire is voluntary, we would considerably appreciate the value of your feedback on your recently concluded transaction with the Philippine Retirement Authority (PRA). Your answers will provide essential information to further enhance the services of PRA. Personal information shared will be kept confidential.

Date of completed transaction: \_\_\_\_\_

Client type (please check):

SRRV Holder     Accreditation Applicant     FOI client     Others \_\_\_\_\_  
 SRRV Applicant     Representative of SRRV Member     Accredited Partner (Marketer, Retirement Facility, Merchant Partner)

Sex:  Male     Female     Prefer Not to Disclose    Age: \_\_\_\_\_    SRRV Number (if applicable): \_\_\_\_\_

Nationality: \_\_\_\_\_

Transaction or Service/s Availed (check applicable):

<input type="checkbox"/> SRRV Application	<input type="checkbox"/> Restamping of SRRV	<input type="checkbox"/> Withdrawal of visa deposit
<input type="checkbox"/> Discontinuance of Application	<input type="checkbox"/> Conversion of deposit to investment	<input type="checkbox"/> Marketer/Retirement Facility/Merchant partner accreditation
<input type="checkbox"/> ID Renewal/Replacement	<input type="checkbox"/> Request for Manager's Check due to conversion of visa deposit to investment	<input type="checkbox"/> Request for information via FOI policy
<input type="checkbox"/> Accreditation of banks	<input type="checkbox"/> Termination from Retirement Program	<input type="checkbox"/> Claim/Release of Marketer's Fee
<input type="checkbox"/> Bank Transfer		

**INSTRUCTIONS: Check mark (✓) your answer to the Citizen's Charter (CC) questions. The CC is an official document that reflects the services of a government agency/office including its requirements, fees, and processing times among others.**

**CC1** Which of the following best describes your awareness of a CC?  
 1. I know what a CC is and I saw this office's CC.  
 2. I know what a CC is but I did NOT see this office's CC.  
 3. I learned of the CC only when I saw this office's CC.  
 4. I do not know what a CC is and I did not see one in this office. (Answer 'N/A' on CC2 and CC3)

**CC2** If aware of CC (answered 1-3 in CC1), would you say that the CC of this office was ...?  
 1. Easy to see     4. Not visible at all  
 2. Somewhat easy to see     5. N/A  
 3. Difficult to see

**CC3** If aware of CC (answered codes 1-3 in CC1), how much did the CC help you in your transaction?  
 1. Helped very much     3. Did not help  
 2. Somewhat helped     4. N/A

**INSTRUCTIONS: For SQD 0-8, please put a check mark (✓) on the column that best corresponds to your answer**

						N/A Not Applicable
SQD0. I am satisfied with the service that I availed.						
SQD1. I spent a reasonable amount of time for my transaction.						
SQD2. The office followed the transaction's requirements and steps based on the information provided.						
SQD3. The steps (including payment) I needed to do for my transaction were easy and simple.						
SQD4. I easily found information about my transaction from the office or its website.						
SQD5. I paid a reasonable amount of fees for my transaction.						
SQD6. I feel the office was fair to everyone, or "walang palakasan", during my transaction.						
SQD7. I was treated courteously by the staff, and (if asked for help) the staff was helpful.						
SQD8. I got what I needed from the government office, or (if denied) denial of request was sufficiently explained to me.						
SQD9. For unsuccessful request, are you satisfied with the reason provided?						
SQD10. For successful request, was the response you received easy to understand?						
SQD11. Did you feel that we communicated with you effectively, from start to finish?						

Suggestions on how we can further improve our services (optional):  
 \_\_\_\_\_  
 \_\_\_\_\_

Email address (optional): \_\_\_\_\_



## **2. Actual Link and the Screenshot of the Survey Google form Used**

Google Form Link (Please click the link below)

[https://docs.google.com/forms/d/e/1FAIpQLSe\\_TWsc0nkn8OZ4o0c91B0\\_1MYDqVIJuOguI2Uhw4RpmMieTg/viewform](https://docs.google.com/forms/d/e/1FAIpQLSe_TWsc0nkn8OZ4o0c91B0_1MYDqVIJuOguI2Uhw4RpmMieTg/viewform)

Printed copy of the Google Form survey is also attached herewith.

# Client Satisfaction Measurement (CSM)

This Client Satisfaction Measurement (CSM) survey keeps track of the customer experience of government offices. Although your response to this questionnaire is voluntary, we would considerably appreciate the value of your feedback on your concluded transaction/s with the Philippine Retirement Authority (PRA).

Your answers will provide essential information to further enhance the services of PRA. Personal information shared will be kept confidential.

\* Indicates required question

1. Date/Month the transaction was completed in 2023 \*

*Mark only one oval.*

- January 2023
- February 2023
- March 2023
- April 2023
- May 2023
- June 2023
- July 2023
- August 2023
- September 2023
- October 2023
- November 2023
- December 2023

2. Client Type (*Please select the applicable*) \*

Mark only one oval.

- SRRV Holder
- SRRV Applicant
- Accreditation Applicant
- Representative of SRRV Member
- FOI Client
- Accredited Partner (Marketer, Retirement Facility, Merchant Partner)
- Other: \_\_\_\_\_

3. Transaction / Services Availed (*Please select the applicable*) \*

Mark only one oval.

- SRRV Application
- Discontinuance of Application
- ID Renewal/Replacement
- Restamping of SRRV
- Conversion of Deposit to Investment
- Request for Manager's Check due to Conversion of Visa deposit to Investment
- Termination from Retirement Program
- Withdrawal of Visa Deposits
- Marketer/Retirement Facility/Merchant Partner Accreditation
- Request for Information via FOI policy
- Claim/Release of Marketer's Fee
- Accreditation of Banks
- Bank Transfer
- Feedback Management (Complaints and Inquiries)

4. Sex \*

Mark only one oval.

Male

Female

Prefer not to say

5. Age \*

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6. SRRV Number (If applicable)

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7. Region in the Philippines

Mark only one oval.

- Region I – Ilocos Region
- Region II – Cagayan Valley
- Region III – Central Luzon
- Region IV-A – CALABARZON
- Region IV-B – MIMAROPA Region
- Region V – Bicol Region
- Region VI – Western Visayas
- Region VII – Central Visayas
- Region VIII – Eastern Visayas
- Region IX – Zamboanga Peninsula
- Region X – Northern Mindanao
- Region XI – Davao Region
- Region XII – SOCCSKSARGEN
- Region XIII – Caraga
- NCR – National Capital Region
- CAR – Cordillera Administrative Region
- BARMM – Bangsamoro Autonomous Region in Muslim Mindanao

**INSTRUCTIONS:** Please tick your answer to the Citizen's Charter (CC) questions.

8. **CC1:** Which of the following best describes your awareness of a CC? \*

Mark only one oval.

- I know what a CC is and I saw this office's CC.
- I know what a CC is but I did NOT see this office's CC.
- I learned of the CC only when I saw this office's CC.
- I do not know what a CC is and I did not see one in this office. (Answer 'N/A' on CC2 and CC3)

9. **CC2:** If aware of CC (answered 1-3 in CC1), would you say that the CC of this office was ...? \*

*Mark only one oval.*

- Easy to see
- Somewhat easy to see
- Difficult to see
- Not visible at all
- Not Applicable

10. **CC3:** If aware of CC (answered codes 1-3 in CC1), how much did the CC help you in your transaction? \*

*Mark only one oval.*

- Helped very much
- Somewhat helped
- Did not help
- Not Applicable

**INSTRUCTIONS:** Please tick on the option that best corresponds to your answer.

11. **SQD0.** I am satisfied with the service that I availed. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable



12. **SQD1.** I spent a reasonable amount of time for my transaction. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

13. **SQD2.** The office followed the transaction's requirements and steps based on the information provided. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

14. **SQD3.** The steps (including payment) I needed to do for my transaction were easy and simple. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable



15. **SQD4.** I easily found information about my transaction from the office or its website. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

16. **SQD5.** I paid a reasonable amount of fees for my transaction. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

17. **SQD6.** I feel the office was fair to everyone, or "**walang palakasan**", during my transaction. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

18. **SQD7.** I was treated courteously by the staff, and (if asked for help) the staff was helpful. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

19. **SQD8.** I got what I needed from the government office, or (if denied) denial of request was sufficiently explained to me. \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

**If not FOI Client, please tick Not Applicable on SQD9 - SQD 11**

20. **SQD9.** For unsuccessful **FOI request**, are you satisfied with the reason provided \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

21. **SQD10.** For successful **FOI request**, was the response you received easy to understand? \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

22. **SQD11.** Did you feel that we communicated with you effectively, with regard to your **FOI request**, from start to finish? \*

*Mark only one oval.*

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not Applicable

*Skip to question 23*

### Suggestions

23. Suggestions on how we can further improve our services (optional):

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24. Email Address (optional)

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