

REQUEST FOR QUOTATION

Date : _____

RFQ No.: _____

Name of Company : _____

Address : _____

Name of Store/Shop : _____

Address : _____

TIN : _____

PhilGEPS Registration Number (required prior to award): _____

The **Small Business Corporation (SBCorp)**, through its Bids and Awards Committee (BAC), intends to procure **Third Party Service Provider for SBCorp's 2023 Client Satisfaction Measurement Survey** in accordance with **Section 53.9** of the 2016 revised Implementing Rules and Regulations of Republic Act of 9184.

Please quote your **best offer** for the item/s described herein, **subject to the Terms and Conditions** provided at the last page of this RFQ. Submit your quotation duly signed by you or your authorized representative not later than **March 14, 2024**. A copy of your **latest Business/Mayor's Permit, Philgeps Registration, Income Tax Return (ITR), Omnibus Sworn Statement(notarized) and BIR 2303** is also required to be submitted along with your quotation/proposal.

For any clarification, you may contact us at telephone no. (02) 5328-1100 to 10 local 1734 or email address at jbperez@sbcorp.gov.ph; bac@sbcorp.gov.ph


Rowena G. Betia
BAC Chairperson

INSTRUCTIONS:

1. Accomplish this RFQ correctly and accurately.
2. Do not alter the contents of this form in any way
3. All technical specifications are mandatory. Failure to comply with any of the mandatory requirements. Will disqualify your quotation.
4. Failure to follow these instructions will disqualify your entire quotation.

Small Business Corporation is an Attached Agency of the Department of Trade and Industry

 17th & 18th Floors, 139 Corporate Center, Valero St., Salcedo Village, Makati City 1227, Philippines
 sbcorporation@sbcorp.gov.ph

 5328-1100 -1110 and 1112-1116
 www.sbcorp.gov.ph

After having carefully read and accepted the Terms and Conditions, I/we submit our quotation/s for the item/s as follows:

| Procurement of (Name of Item/s to be procured) | |
|--|----------------|
| TECHNICAL SPECIFICATIONS (detailed) | REMARKS |
| <p>TERMS OF REFERENCE 2023 Customer Satisfaction Measurement (CSM) for External Services</p> <p>OBJECTIVES OF THE SURVEY</p> <p>The Customer Satisfaction Measurement (CSM) seeks to promote the adoption of a harmonized and standardized framework in measuring client satisfaction across all levels of the government and measure and compare the service performance of all government agencies in a uniform manner.</p> <p>COVERAGE AND SCOPE</p> <p>Survey Period. From 1 January to 31 December 2023. The survey period shall mean that respondents shall be providing responses to the survey for external services¹ provided by SB Corporation in 2023 and shall likewise be reiterated during the conduct of the survey.</p> <p>RESEARCH TEAM STRUCTURE AND TRAINING</p> <p>The service provider that will administer the survey and generate/analyze the results should have a dedicated pool of researchers for this CSM and should follow the research team structure required by the ARTA MC No. 2022-</p> | |

¹ External services are government services applied for or requested by external citizens or clients or those who do not form part or belong to the government agency or office providing the service.

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05 (Annex A), ARTA MC No. 2023-05 (Annex B), and Joint ARTA-GCG MC No. 1 (Annex C).

PROJECT COST

The engagement will have a project cost of **PESOS: SEVEN HUNDRED FIFTY THOUSAND (PhP 750,000.00)**, inclusive of VAT. A downpayment of fifteen percent (15%) of the project cost will be issued upon signing of the contract. The remaining eighty-five percent (85%) will be processed for payment upon receipt of the final report of the service provider.

ELIGIBILITY REQUIREMENTS FOR SERVICE PROVIDER

- a. The service provider possesses relevant valid business licenses to offer and provide such services to be procured.
- b. Must have at least 5 years experience in the conduct of market research and survey.
- c. Must have a pool of experts/professionals each having at least 3 years of experience in market research and survey.
- d. Must have adequate pool and experienced resources to conduct such engagement as well as to prepare for and attend meetings as required by the SB Corporation.
- e. Must have conducted customer satisfaction surveys on MSMEs and/or familiarity on financing services.
- f. The service provider must meet the minimum eligibility requirements and short-listing for consulting services under R.A. No. 9184, otherwise known as the "Government Procurement Reform Act."
- g. Must be able to submit a proposal that is consistent with the guidelines of the GCG.
- h. Preferably a member of professional market research organizations (e.g. ESOMAR, MORES)

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TIME FRAME AND PAYMENT SCHEDULE

- a. The project shall last (including the delivery of final outputs) for a maximum of fifty (50) calendar days after the issuance of the Notice to Proceed (NTP).
- b. The project shall be undertaken following the timeline of activities after receipt of the NTP, which may be modified as mutually agreed and formalized by both Parties, below:

| Day from Receipt of Notice to Proceed (NTP) | Activity | Deliverables |
|---|---|--|
| 0 | Receipt of the NTP | |
| Day 1 | Onboarding Meeting with SBCorp | |
| Days 2 to 4 | Preparation of the Inception Report | Inception Report |
| Days 5 to 19 | Conduct of Survey Proper / Data Gathering | |
| Days 20 to 22 | Spot and Back Checking | Spot Checking Report Back Checking Report |
| Days 23 to 27 | Data Processing | Data Quality Control Report |

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| | | | |
|--|------------------------------|---------------------------------|--|
| Day 28 | Submission of Initial Report | Initial Project Terminal Report | |
| Day 30 | Submission of Final Report | Final Project Terminal Report | |
| <p>c. ABC is inclusive of local taxes applicable for contractor of services such as 15% Expanded Withholding Tax (EWT) and 5% Withholding Tax on Government Money Payments (GMP).</p> <p>d. Processing of payment will begin upon submission of all required outputs or documents, acceptance of the project terminal report, and receipt of the invoice and complete supporting documents in accordance with applicable government rules and regulations.</p> <p>(SEE ATTACHED DETAILED TERMS OF REFERENCE)</p> | | | |
| DELIVERY REQUIREMENT | | | |
| a) | | | |
| b) | | | |
| | | | |

FINANCIAL OFFER:

Please quote your **best offer** for the item below. Please do not leave any blank items. Indicate "0" if item being offered is for free.

| PROCUREMENT OF (name of item/s to be procured) | | | |
|---|-----------------------------|----------------|---------------------------------|
| Quantity (A) | Description/Brand/Model (B) | Unit Price (C) | Total Offered Quotation (A x C) |
| Php750,000 Tax Inclusive | | | In words _____ |
| | | | In figures: _____ |

TERMS AND CONDITIONS

- Bidders shall provide correct and accurate information required in this form.
- Bidders may quote for any or all the items.
- Price quotation/s must be valid for a period of thirty (30) calendar days from the date of submission.
- Price quotation/s, to be denominated in Philippine peso, shall include all taxes, duties and/or levies payable.
- Quotations exceeding the Approved Budget for the Contract (ABC) shall be rejected.
- Award of contract shall be made to the lowest quotation (for goods and infrastructure) or, the highest rated offer (for consulting services) which complies with the minimum technical specifications and other terms and conditions stated herein.

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7. Any interlineations, erasures or overwriting shall be valid only if they are signed or initialed by you or any of your duly authorized representative/s.
8. The item/s shall be delivered according to the requirements specified in the Technical Specifications.
9. The SBCorp shall have the right to inspect and/or to test the goods to confirm their conformity to the technical specifications.
10. In case of two or more bidders are determined to have submitted the Lowest Calculated Quotation/Lowest Calculated and Responsive Quotation, the SBCorp shall adopt and employ “draw lots” as the tie-breaking method to finally determine the single winning provider in accordance with GPPB Circular 06-2005.
11. Payment shall be made after delivery and upon the submission of the required supporting documents, i.e, order slip and/or billing statement, by the contractor. Our Government Servicing Bank, i.e, the Land Bank of the Philippines, shall credit the amount due to the contractor’s identified bank account not earlier than twenty four (24) hours, but not later than forty-eight (48) hours, upon receipt of our advice. Please note that the corresponding bank transfer fee, if any, shall be chargeable to the contractor’s account.
12. Liquidated damages equivalent to one tenth of one percent (0.1%) of the value of the goods not delivered within the prescribed delivery period shall be imposed per day of delay. The SBCorp shall rescind the contract once the cumulative amount of liquidated damages reaches ten percent (10%) of the amount of the contract, without prejudice to other courses of action and remedies open to it.

Office Telephone No. _____

Signature over Printed Name

Mobile No. _____

Position/Designation

Email address: _____

TERMS OF REFERENCE

2023 Customer Satisfaction Measurement (CSM) for External Services

BACKGROUND

Under Republic Act (RA) No. 10149, the Performance Evaluation System (PES) was established by the Governance Commission on GOCCs (GCG) to establish the process of appraising the accomplishment of GOCCs in a given fiscal year based on the set performance criteria. One of the measures in determining the rating in the PES is the overall satisfaction of the clients for the services availed in a GOCC.

Pursuant to Section 3(b), Rule IV of the Implementing Rules and Regulations (IRR) of RA No. 11032 or the Ease of Doing Business Act of 2018, "all agencies shall embed feedback mechanisms and client satisfaction measurement in their process improvement efforts" and that the agency shall report to the Anti-Red Tape Authority (ARTA) the results of the Client Satisfaction Survey for each service.

On 12 April 2023, Joint Memorandum Circular (JMC) No. 1 between the GCG and ARTA was issued to provide supplemental guidance to GOCCs regarding compliance to the GCG Memorandum Circular 2023-01 on the PES for the GOCC Sector and ARTA MC No. 2022-05 on the Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement.

OBJECTIVES OF THE SURVEY

The Customer Satisfaction Measurement (CSM) seeks to promote the adoption of a harmonized and standardized framework in measuring client satisfaction across all levels of the government and measure and compare the service performance of all government agencies in a uniform manner.

COVERAGE AND SCOPE

Survey Period. From 1 January to 31 December 2023. The survey period shall mean that respondents shall be providing responses to the survey for external services¹ provided by SB Corporation in 2023 and shall likewise be reiterated during the conduct of the survey.

Respondent Criteria. Respondents covered by the CSM should be all clients of SB Corporation that have availed external services as identified in its 2023 Citizen's Charter,² as follows:

1. RISE UP Program
2. MSME Wholesale Lending Programs (Regular and P3)
3. Procurement (Public Bidding) for Consulting Services
4. Procurement (Public Bidding) for Goods and Services
5. Procurement (Small Value) for Property, Supplies and Materials
6. Complaints Handling – Telephone
7. Complaints Handling – Email
8. Certificate of Full Payment
9. Certificate of Loan Repayments and Premium Contributions
10. Issuance of Statement of Account
11. Disposal of Real and Other Properties – Public Bidding
12. Disposal of Real and Other Properties – Negotiated Sale

¹ External services are government services applied for or requested by external citizens or clients or those who do not form part or belong to the government agency or office providing the service.

13. Payment of Success Fees for Collection Agencies
14. Recruitment and Selection Process for JG 12 and below
15. Recruitment and Selection Process for Account Officers
16. Recruitment and Selection Process for JG 13 and above
17. Request for HR-related Documents
18. Official Receipt Issuance

The complete lists of clients with the necessary contact information will be provided by SB Corporation.

The respondents shall be surveyed only if the transactions are completed during the survey period. A transaction is considered complete when the client has reached the final process of the service as indicated in the 2023 Citizen's Charter.

Confidentiality of the Client Information. Researchers and all partners shall sign a Non-Disclosure and Confidentiality Agreement which contains the following items:

- a. The client database/masterlist should be used for the purposes of this CSM and should not be shared with anyone who is not involved in the project.
- b. The client database/masterlist should only be provided to the lead researcher who will be conducting the CSM. Other staff conducting the CSM should only be provided with the list of customers that they will be contacting.
- c. The client database/masterlist should be disposed of properly or returned to SB Corporation. No copies of the client database/masterlist, whether printed or in soft copy formats, should be left with the service provider.

Eliminate Bias. SB Corporation shall not inform their customers that a CSM will be conducted. Instead, a letter to the service provider shall be provided by SB Corporation stating the purpose for which the CSM is conducted and the authority to collect data on its behalf. The letter will be shown to the respondents before the conduct of the CSM and shall contain, at the minimum, the following information:

- a. Brief profile and salient information of the service provider and what they will be conducting;
- b. Purpose of the research;
- c. Invitation of customers to participate in the survey; and
- d. Assurance of confidentiality.

METHODOLOGY

Data Collection Instrument. The collection of data shall be done using the questionnaire prescribed by ARTA, which shall be numbered, to ensure consistency all throughout the project and eliminate interviewer bias. The questionnaire shall be either in English or Filipino, depending on the preference of the client.

Content of the Questionnaire. The questionnaire includes eight (8) Service Quality Dimensions (SQDs) with the following statements:

| Key Drivers of Satisfaction | Statements |
|-----------------------------|---|
| Responsiveness | I spent a reasonable amount of time for my transaction. |
| Reliability | The office followed the transaction's requirements and steps based on the information provided. |
| Access and Facilities | The steps (including payment) I needed to do for my transaction were easy and simple. |

| | |
|---------------|--|
| Communication | I easily found information about my transaction from the office or its website. |
| Costs | The amount you paid for your transaction is value for money. |
| Integrity | I feel the office was fair to everyone, or "walang palakasan", during my transaction. |
| Assurance | I was treated courteously by the staff, and (if asked for help) the staff was helpful. |
| Outcome | I got what I needed from the government office, or (if denied) denial of request was sufficiently explained to me. |
| Overall | I am satisfied with the service that I availed. |

Rating Scale and Scoring System. A 5-point Likert scale shall be used to measure the Service Quality Dimensions (SQDs) for the overall satisfaction rating question that determines the level of satisfaction/dissatisfaction of the customers.

| Scale | Rating |
|-------|----------------------------|
| 1 | Strongly Disagree |
| 2 | Disagree |
| 3 | Neither Agree nor Disagree |
| 4 | Agree |
| 5 | Strongly Agree |

The percentage of respondents that rated "Agree" and "Strongly Agree" shall be used to get each SQD's score.

A question that was answered with two (2) or more check marks shall be considered as invalid.

The percentage of respondents that rated "Agree" and "Strongly Agree" for eight (8) SQDs shall be used to compute the Overall Score.

$$\text{Overall Score} = \frac{\text{Number of 'Strongly Agree' Answers} + \text{Number of 'Agree' Answers}}{\text{Total Number of Respondents} - \text{Number of 'N/A' Answers}} \times 100$$

The interpretation of the results shall be as follows:

| Percentage | Rating |
|----------------|-------------------|
| Below 60.0% | Poor |
| 60.0% - 79.9% | Fair |
| 80.0% - 89.9% | Satisfactory |
| 90.0% - 94.9% | Very Satisfactory |
| 95.0% - 100.0% | Outstanding |

Data Collection Method. The collection of data shall be done either online (by providing a link, QR code, or other similar means to the survey form) or offline (by telephone interview or other similar means). As prescribed by ARTA, the accomplishment of the survey should not exceed five (5) minutes.

While the Guidelines on the Harmonized CSM does not require the recording of telephone interviews with the respondent as well as submission of the same as an attachment to the Final Report, the service provider should be able to provide the procedure undertaken to corroborate the consistency and accuracy of the conduct of the survey via telephone. This shall serve as basis and ensure SB Corporation's compliance to requirements in the

submission of a detailed Back-Checking Report, copies of sample accomplished survey instruments, among others, as part of the CSM Report.

Back-checking shall be conducted by a project team member other than the original interviewer/enumerator who shall re-contact the respondent to check the quality and validity of the output.

For surveys conducted offline, it shall be the task of the interviewer/enumerator to fill-out the questionnaires in surveys conducted through telephone or other similar means. Considering the mode employed, the signature of the respondents shall be dispensed with.

Similarly, the Spot-Checking and Back-Checking Reports must detail that the respondents are correctly identified and that their answers are accurately reflected.

PROJECT TIMELINE AND SAMPLE SIZE

Based on the ARTA-provided calculator, the minimum number of responses shall be as follows, which shall be spread among SB Corporation's four (4) regional lending groups and their respective provinces:

| EXTERNAL SERVICE | TOTAL NUMBER OF CLIENTS | MINIMUM NUMBER OF RESPONDENTS |
|---|-------------------------|-------------------------------|
| 1. RISE UP Program | 10,660 | 371 |
| 2. MSME Wholesale Lending Programs (Regular and P3) | 510 | 219 |
| 3. Procurement (Public Bidding) for Consulting Services | 0 | 0 |
| 4. Procurement (Public Bidding) for Goods and Services | 9 | 9 |
| 5. Procurement (Small Value) for Property, Supplies and Materials | 125 | 94 |
| 6. Complaints Handling – Telephone | 9 | 9 |
| 7. Complaints Handling – Email | 67 | 57 |
| 8. Certificate of Full Payment | 51 | 45 |
| 9. Certificate of Loan Repayments and Premium Contributions | 70 | 59 |
| 10. Issuance of Statement of Account | 1 | 1 |
| 11. Disposal of Real and Other Properties – Public Bidding | 0 | 0 |
| 12. Disposal of Real and Other Properties – Negotiated Sale | 0 | 0 |
| 13. Payment of Success Fees for Collection Agencies | 1 | 1 |
| 14. Recruitment and Selection Process for JG 12 and below | 0 | 0 |
| 15. Recruitment and Selection Process for Account Officers | 0 | 0 |
| 16. Recruitment and Selection Process for JG 13 and above | 1 | 1 |
| 17. Request for HR-related Documents | 28 | 26 |
| 18. Official Receipt Issuance | 0 | 0 |
| TOTAL | 11,532 | 892 |

SB Corporation shall evaluate proposals on the provider's ability to complete the CSM in the timeliest manner.

RESEARCH TEAM STRUCTURE AND TRAINING

The service provider that will administer the survey and generate/analyze the results should have a dedicated pool of researchers for this CSM and should follow the research team structure required by the ARTA MC No. 2022-05 (Annex A), ARTA MC No. 2023-05 (Annex B), and Joint ARTA-GCG MC No. 1 (Annex C).

PROJECT COST

The engagement will have a project cost of **PESOS: SEVEN HUNDRED FIFTY THOUSAND (PhP 750,000.00)**, inclusive of VAT. A downpayment of fifteen percent (15%) of the project cost will be issued upon signing of the contract. The remaining eighty-five percent (85%) will be processed for payment upon receipt of the final report of the service provider.

ELIGIBILITY REQUIREMENTS FOR SERVICE PROVIDER

- a. The service provider possesses relevant valid business licenses to offer and provide such services to be procured.
- b. Must have at least 5 years experience in the conduct of market research and survey.
- c. Must have a pool of experts/professionals each having at least 3 years of experience in market research and survey.
- d. Must have adequate pool and experienced resources to conduct such engagement as well as to prepare for and attend meetings as required by the SB Corporation.
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- f. The service provider must meet the minimum eligibility requirements and short-listing for consulting services under R.A. No. 9184, otherwise known as the "Government Procurement Reform Act."
- g. Must be able to submit a proposal that is consistent with the guidelines of the GCG.
- h. Preferably a member of professional market research organizations (e.g. ESOMAR, MORES)

PROPOSED PROFESSIONAL STAFF The required number and experience of the proposed professional staff is as follows:

| Key Personnel | Education and Experience |
|------------------------|---|
| Project Manager (1) | <ul style="list-style-type: none"> • Bachelor's and/or Master's Degree in relevant fields • At least five (5) years' experience in designing, developing, and conducting surveys which measure customer/ stakeholder satisfaction; and • At least five (5) years' experience in project management |
| Survey Specialists (3) | <ul style="list-style-type: none"> • Bachelor's Degree in relevant fields • At least three (3) years' experience in designing, developing, and conducting surveys which measure customer/ stakeholder satisfaction |
| Support Staff (3) | <ul style="list-style-type: none"> • Bachelor's Degree • At least a year's experience in staff support in project management and implementation |

TIME FRAME AND PAYMENT SCHEDULE

- a. The project shall last (including the delivery of final outputs) for a maximum of fifty (50) calendar days after the issuance of the Notice to Proceed (NTP).
- b. The project shall be undertaken following the timeline of activities after receipt of the NTP, which may be modified as mutually agreed and formalized by both Parties, below:

| Day from Receipt of Notice to Proceed (NTP) | Activity | Deliverables |
|--|---|--|
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| Days 2 to 4 | Preparation of the Inception Report | Inception Report |
| Days 5 to 19 | Conduct of Survey Proper / Data Gathering | |
| Days 20 to 22 | Spot and Back Checking | Spot Checking Report Back Checking Report |
| Days 23 to 27 | Data Processing | Data Quality Control Report |
| Day 28 | Submission of Initial Report | Initial Project Terminal Report |
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- c. ABC is inclusive of local taxes applicable for contractor of services such as 15% Expanded Withholding Tax (EWT) and 5% Withholding Tax on Government Money Payments (GMP).
- d. Processing of payment will begin upon submission of all required outputs or documents, acceptance of the project terminal report, and receipt of the invoice and complete supporting documents in accordance with applicable government rules and regulations.