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Thursday, August 2, 2018 11:11 AM Billie Jean Lagazo SBGFC » [Log-out](#)

## Bid Notice Abstract

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### Request for Quotation (RFQ)

**Reference Number:** 5501078  
**Procuring Entity:** SMALL BUSINESS GUARANTEE AND FINANCE CORP.  
**Title:** Customer Satisfaction Survey 2018  
**Area of Delivery:** Metro Manila

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<b>Solicitation Number:</b> 18-SBC-051	<b>Status:</b> Closed	
<b>Trade Agreement:</b> Implementing Rules and Regulations	<b>Associated Components</b>	2
<b>Procurement Mode:</b> Negotiated Procurement - Small Value Procurement (Sec. 53.9)		
<b>Classification:</b> Consulting Services	<b>Bid Supplements</b>	1
<b>Category:</b> Consulting Services		
<b>Approved Budget for the Contract:</b> PHP 150,000.00	<b>Document Request List</b>	2
<b>Contract Duration:</b> 4 Month/s		
<b>Client Agency:</b>	<b>Date Published</b>	21/07/2018
	<b>Last Updated / Time</b>	25/07/2018 9:28 AM
	<b>Closing Date / Time</b>	30/07/2018 10:00 AM

**Description**

TERMS OF REFERENCE FOR THE CUSTOMER SATISFACTION SURVEY 2018

BACKGROUND

The standard guidelines on the conduct of the Customer Satisfaction Survey (CSS) have been issued by GCG to all GOCCs under its jurisdiction in April 2018. With these guidelines, GCG prescribed the following:

- a. Standard methodology for the conduct and administration of the survey instrument, data encoding and processing, and analysis of survey results, as well as the research or project team composition; and,
- b. Standard questionnaire that will be administered by trained field interviewers.

GOCCs have likewise been classified according to the survey methodology: Method A for Intercept Interviews and Method B for Telephone Interviews. SBCorp has been classified under Method B, with target respondents identified as business organizations (MSMEs).

The survey will make use of a standard and structured pen-and-paper questionnaire, and GOCCs are expected to hire a third-party provider to administer the survey, and generate and interpret the result. The survey will only cover primary customers or those with direct economic transactions with SBCorp.

OBJECTIVES OF THE SURVEY

The Customer Satisfaction Survey is conducted to measure customer satisfaction on the services provided by SBCorp to its clientele. This is part of government's initiative to deepen citizen participation in government processes, particularly in the delivery of products and/or services.

The results of the survey will likewise provide valuable inputs to improve SBCorp's products and services.

COVERAGE AND SCOPE

Under the GCG guidelines, clients to be covered by the CSS should satisfy at least one of the criteria below:

- a. Current/ongoing customers of SBCorp
- b. Has a current/active account with SBCorp
- c. Had at least one transaction with SBCorp during the time of the survey.

For CSS 2018, SBCorp clients under the following financing programs will be covered:

- a. Retail Lending Program – Accounts with loan approvals and/or releases during the period from July 1, 2017 to June 30, 2018 will be invited to participate in the survey. Based on the latest data, there are 848 borrowers falling under this category
- b. P3 Wholesale Program – SBCorp has 204 partner institutions participating in the P3 program with active credit lines.
- c. Capacity Building Program – Twenty-one (21) banks have been capacitated by SBCorp from July 1, 2017 to June 30, 2018 under the RBL Program for financial institutions.

A sample size of n=100 is being recommended, to yield a MOE of +/-9.8% at 95% confidence level for customers under the Retail Lending Program and the P3 Wholesale Program. For the Capacity Building Program with 21 customers, it is recommended that 50% of the financial institutions be covered by the survey. Sampling procedure for Method B (Telephone Interviews) will utilize the systematic sampling technique, as detailed in the guidelines of GCG (Annex A).

The complete list of clients with the necessary contact information will be provided by SBCorp. To ensure the confidentiality of the lists, the researchers and all their partners should sign a Non-Disclosure and Confidentiality Agreement which contains the following items:

- a. The list should only be used for the purposes of this particular customer satisfaction survey and should not be shared with anyone who is not involved in the project.
- b. The masterlist should only be provided to the researcher who will be doing the systematic selection. All field interviewers should only be provided with the list of customers that they will be contacting.
- c. The list should be disposed or properly or returned to SBCorp. No copies of the list, be it printed or in soft copy formats, should be left with the third-party agency.

Note: As part of the ESOMAR codes and guidelines, the identity of the respondents will be kept confidential from GCG or SBCorp.

**METHODOLOGY**

The collection of data will be done using the structured pen and paper questionnaire of GCG, which should be numbered. The questionnaire is composed of two (2) sections:

- a. Screener
- b. Main Questionnaire

Per the GCG guidelines, GOCs may opt to include another section to reflect specific questions related to its other products or services without the need for authority from GCG. However, questions under screener and main questionnaire are fixed and may not be altered without prior approval from the GCG.Procedures.

Data encoding, processing and analysis of survey results will strictly follow the procedures set by GCG. (Annex A)

**PROJECT TIMELINE AND DELIVERABLES**

Based on the GCG guidelines, a sample size of n=100 will have a timeline of 12-14 weeks. The detailed activities and deliverables are contained in Annex A.

**RESEARCH TEAM AND STRUCTURE**

The third-party provider that will administer the survey and generate/analyze the results should follow the research team structure required by the GCG guidelines. (Annex A)

**PROJECT COST**

Maximum of P150,000 inclusive of VAT. A downpayment of fifteen (15%) of the project cost will be issued upon signing of the contract.

**ELIGIBILITY REQUIREMENTS FOR THIRD-PARTY PROVIDER**

- a. Must have at least 5 years experience in the conduct of market research and survey
- b. Must have a pool of experts/professionals each having at least 3 years of experience in market research and survey
- c. Must be able to submit a proposal that is consistent with the guidelines of the GCG
- d. Preferably a member of professional market research organizations (e. g. ESOMAR, MORES)

Pis. quote your best rate

Thank you.

**Line Items**

Item No.	Product/Service Name	Description	Quantity	UOM	Budget (PHP)
1	Consultant Services	Customer Satisfaction Survey 2018	1	Lot	150,000.00

**Remarks**

Awaiting for proposals

**Created by** Billie Jean P. Lagazo  
**Date Created** 18/07/2018

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