

REQUEST FOR QUOTATION

Date : _____

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 the Conduct of CY2025 Client Satisfaction Measurement (CSM) Survey for External Clients and Drafting of the Consolidated 2025 CSM Report** 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 **February 9, 2026 at 10:00 AM**. A copy of your valid **Business/Mayor's Permit, Philgeps Registration, Notarized Omnibus Sworn Statement***, updated **ITR 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 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.

**Submit the following documents:*

1. Certified-true-copy of Secretary's Certificate for corporation, partnership or cooperative; or
2. Special Power of Attorney:
 - a. Joint venture - executed by all members thereof giving full powers and authority to its officers to sign the OSS/Sworn Statements and do acts to represent the bidder; or
 - b. Single Proprietorship – if the person representing the company or acting on behalf of the company is not the registered owner.

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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 style="text-align: center;">Third Party Service Provider for the Conduct of CY2025 Client Satisfaction Measurement (CSM) Survey for External Clients and Drafting of the Consolidated 2025 CSM Report</p> <p>OBJECTIVES</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>OUTPUTS EXPECTED FROM THE SERVICE PROVIDER</p> <p>1. Conduct of CY2025 Client Satisfaction Measurement (CSM) Survey for External Clients</p> <p>Survey Period. From 1 January to 31 December 2025. The survey period shall mean that respondents shall be providing responses to the survey for external services¹ provided by SB Corporation in 2025 and shall likewise be reiterated during the conduct of the survey.</p> <p>Respondent Criteria. Respondents covered by the CSM should be all clients of SB Corporation that have availed external services as identified in its 2025 Citizen’s Charter,² as follows:</p> <ol style="list-style-type: none"> 1. Resilient, Innovative, Sustainable Enterprises Unleash your Powers (RISE UP) Program 2. Enterprise Rehabilitation Financing Umbrella (ERF) Program 3. Business Expansion Financing (BEF) Program 4. PO Financing (POF) Program 5. Franchising Funding (FF) Program 6. MSME Wholesale Lending Programs (Regular and P3) 7. Procurement (Public Bidding) for Consulting Services 8. Procurement (Public Bidding) for Goods and Services 	<p><i>Bidders must state here either “Comply” or “Not Comply” against each of the individual parameters of each Specifications</i></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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9. Procurement (Small Value) for Property, Supplies and Materials
10. Complaints Handling – Telephone
11. Complaints Handling – Email
12. Certificate of Full Payment
13. Certificate of Loan Repayments and Premium Contributions
14. Issuance of Statement of Account
15. Disposal of Real and Other Properties – Public Bidding
16. Disposal of Real and Other Properties – Negotiated Sale
17. Payment of Success Fees for Collection Agencies
18. Recruitment and Selection Process for JG 12 and below
19. Recruitment and Selection Process for JG 13 and above
20. Request for HR-related Documents

The complete list 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 2025 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.

Bidders must state here either "Comply" or "Not Comply" against each of the individual parameters of each Specifications

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2. Drafting of the Consolidated 2025 CSM Report

Consolidated 2025 CSM Report. The consolidated 2025 CSM Report shall include the results from the conduct of CSM for both external and internal clients. It shall be in accordance with the format and other requirements prescribed by ARTA.

CSM for Internal Clients. SB Corporation will be providing the results of its CSM Survey for Internal Clients. It shall cover internal services identified in its 2025 Citizen's Charter, as follows:

1. Dispatch and Recording of Outgoing Documents
2. Transport Services
3. Certificate of Loan Repayments and Premium Contributions
4. First Pay, Maternity Pay and Overtime Pay
5. GSIS Claims Transactions
6. GSIS Member's Request for Change of Employee Information
7. GSIS Loan Applications for Certification
8. HDMF Transactions
9. Recruitment and Selection Process for JG 12 and Below
10. Recruitment and Selection Process for JG 13 and Above
11. Request for HR-related Documents
12. Technical Support without Procurement (Simple)
13. Technical Support without Procurement (Complex)
14. Technical Support without Procurement (Highly Technical)
15. Access to Corporate Network (Simple)
16. Access to Corporate Network (Complex)
17. Applications System Development
18. Legal Opinion
19. Preparation of Contracts
20. Petty Cash Fund Request

METHODOLOGY OF THE CSM SURVEY FOR EXTERNAL CLIENTS

Data Collection Instrument. The collection of data shall be done using the questionnaire prescribed by ARTA, which shall be numbered, to ensure consistency 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.

Bidders must state here either "Comply" or "Not Comply" against each of the individual parameters of each Specifications

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.

Overall Score =	Number of 'Strongly Agree' Answers + Number of 'Agree' Answers	X 100
	Total Number of Respondents – Number of 'N/A' Answers	

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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 primarily be done by phone interview or other similar means to expedite the engagement of clients to survey. The sending of a link, QR code or any other survey forms online shall only be done (1) if the client did not provide a contact number and (2) after all efforts to contact through phone have been exhausted to no avail. 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 to 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.

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 regional lending groups and their respective provinces:

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EXTERNAL SERVICE	TOTAL NUMBER OF CLIENTS	MINIMUM NUMBER OF RESPONDENTS
1. RISE UP Program	10,228	372
2. Enterprise Rehabilitation Financing Umbrella (ERF) Program	2,693	336
3. Business Expansion Financing (BEF) Program	52	46
4. PO Financing (POF) Program	8	8
5. Franchising Funding (FF) Program	1	1
6. MSME Wholesale Lending Programs (Regular and P3)	215	138
7. Procurement (Public Bidding) for Consulting Services	0	0
8. Procurement (Public Bidding) for Goods and Services	3	3
9. Procurement (Small Value) for Property, Supplies and Materials	196	130
10. Complaints Handling – Telephone	5	5
11. Complaints Handling – Email	73	61
12. Certificate of Full Payment	416	200
13. Certificate of Loan Repayments and Premium Contributions	1	1
14. Issuance of Statement of Account	578	231
15. Disposal of Real and Other Properties – Public Bidding	0	0
16. Disposal of Real and Other Properties – Negotiated Sale	5	5
17. Payment of Success Fees for Collection Agencies	1	1
18. Recruitment and Selection Process for JG 12 and below	0	0
19. Recruitment and Selection Process for JG 13 and above	0	0
20. Request for HR-related Documents	29	27
TOTAL	14,504	1,566

RESEARCH TEAM STRUCTURE AND TRAINING

The service provider that will administer the survey, generate/analyze the results, and draft the CSM Report should

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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: EIGHT HUNDRED FIFTY THOUSAND (PhP 850,000.00)**, inclusive of VAT. A downpayment of fifteen percent (15%) of the project cost will be issued upon signing of the contract subject to the submission of bank guarantee equivalent to 15% downpayment. The remaining eighty-five percent (85%) will be processed for payment upon receipt of the final report of the service provider.

CRITERIA AND RATING SYSTEM FOR THE SERVICE PROVIDER

CRITERIA	RATING SYSTEM
Must have at least 5 years of experience in the conduct of market research and survey.	30%
Must have a pool of experts/professionals each having at least 3 years of experience in market research and survey.	20%
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.	15%
Must have conducted customer satisfaction surveys on MSMEs and/or familiarity on financing services.	15%
The service provider possesses relevant valid business licenses to offer and provide such services to be procured.	5%
Must be able to submit a proposal that is consistent with the guidelines of the GCG.	5%
The service provider must meet the minimum eligibility requirements and short-listing for consulting services under Republic Act No. 12009 (RA 12009), also known as the New Government Procurement Act (NGPA).	5%
Preferably a member of professional market research organizations (e.g. ESOMAR, MORES)	5%
TOTAL	100%

The passing rate is 70%.

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

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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

- The 2025 CSM Report shall be finalized and submitted to SB Corporation on or before 03 April 2026 (Friday).
- 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:

Date	Activity	Deliverables
	Receipt of the Notice to Proceed (NTP)	
1 to 3 days after receipt of NTP	Onboarding Meeting with SBCorp	
5 days after receipt of NTP	Submission of the Inception Report	Inception Report
	Conduct of Survey Proper / Data Gathering	Weekly Update
30 March 2026	Submission of Initial CSM Report	Initial CSM Report
03 April 2026	Submission of Final CSM Report	Final CSM Report

- 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).
- 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

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supporting documents in accordance with applicable government rules and regulations.	
DELIVERY REQUIREMENT	
a) 1 lot	

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)
ABC Php850,000.00 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.
- 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.
- The item/s shall be delivered according to the requirements specified in the Technical Specifications.
- The SBCorp shall have the right to inspect and/or to test the goods to confirm their conformity to the technical specifications.
- 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

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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: _____