

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 **In-House Training on Legal Documentation** 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 **November 8, 2024**. A copy of your **latest Business/Mayor's Permit, Philgeps Registration, Notarized Omnibus Sworn Statement***, **ITR (updated)** 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


Rowena G. Betia
BAC Chairperson 

INSTRUCTIONS:

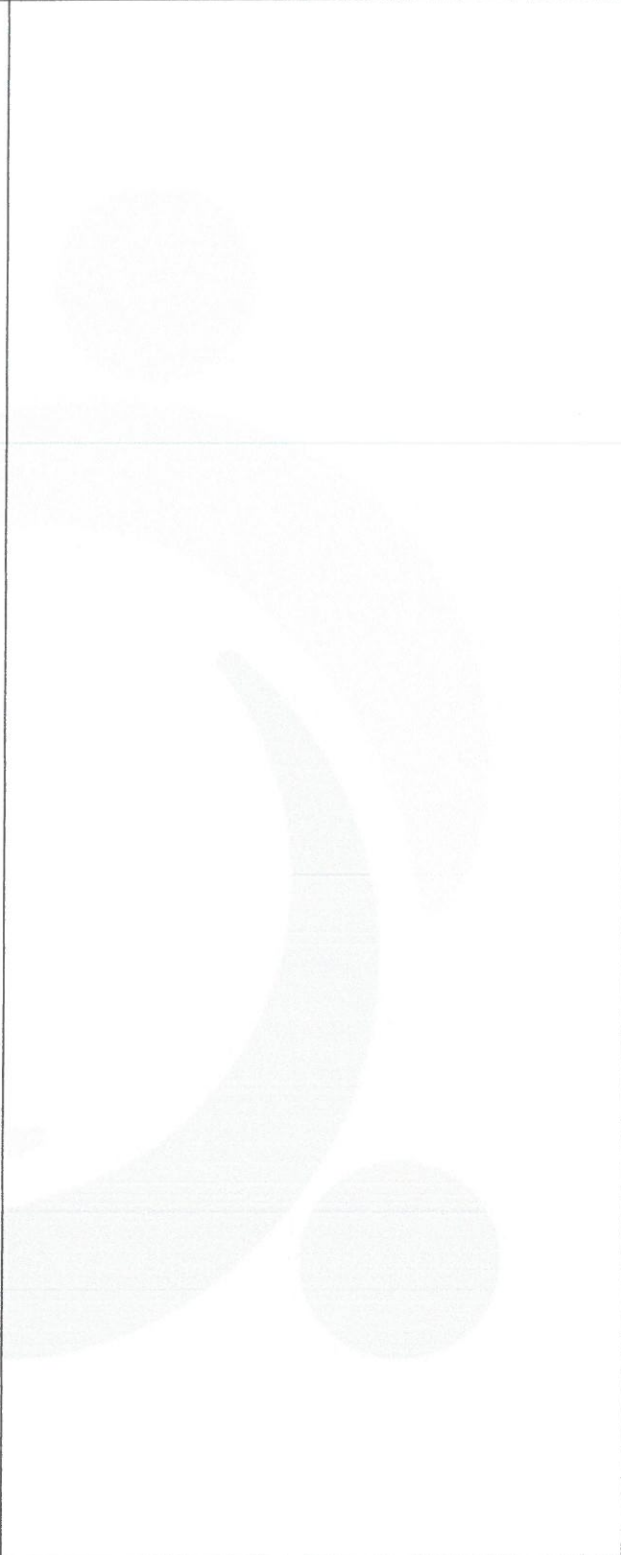
1. Accomplish this RFQ correctly and accurately.
2. Do not alter the contents of this form in any way
3. All technical specifications are mandatory. Failure to comply with any of the mandatory requirements Will disqualify your quotation.
4. Failure to follow these instructions will disqualify your entire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

**Submit certified-true-copy of Secretary's Certificate in case of a corporation, partnership, or cooperative; or Special Power of Attorney of all members of the joint venture giving full power and authority to its officer to sign the OSS and do acts to represent the Bidder.*

4. Failure to follow these instructions will disqualify your entire quotation.

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 align="center">IN-HOUSE TRAINING ON LEGAL DOCUMENTATION</p> <p><u>COURSE DESCRIPTION</u></p> <p>The course will equip the participants with the knowledge and skills necessary to create, manage and understand various legal documents used in professional settings.</p> <p>By the end of the training, participants should have a comprehensive understanding of the legal documentation process and be able to effectively draft, review and manage legal documents in various contexts.</p> <p><u>OBJECTIVES</u></p> <p>The objectives of the training program are as follows:</p> <ul style="list-style-type: none"> • Understanding legal documentation • Develop legal drafting skills • Enhancing document review competency • Ensuring compliance with legal and regulatory standards • Improving accuracy and attention to detail • Utilizing digital tools for legal documentation • Building confidence in handling legal documents • Understanding ethical and professional responsibilities <p><u>COURSE OUTLINE</u></p> <p>Module 1: Introduction to Legal Documentation</p> <ul style="list-style-type: none"> ○ Importance of legal document in SB Corp lending business 	

<ul style="list-style-type: none"> ○ Overview of common types of documents ○ Role of a document verifier in organizational compliance and security <p>Module 2: Types of Legal Documents</p> <ul style="list-style-type: none"> ○ Contracts (e.g. loan agreements, lease contracts) ○ Corporate documents (e.g. articles of Incorporation by laws) ○ Regulatory documents (e.g. compliance reports, licenses) ○ Personal documents (e.g. with power of attorney) ○ Inclusion if specific examples of legal document commonly used in banking and lending (e.g., loan agreements, promissory notes, KYC documents) ○ Discussion of SB Corporation's current loan documents and documentary requirements ○ Coverage of financial documents such as credit reports, and financial statements <p>Module 3: Document Structure and Language</p> <ul style="list-style-type: none"> ○ Standard formats and clauses ○ Legal terminology and jargon ○ Importance of clarity and precision ○ Techniques of interpreting complex legal terminology during document verification ○ Highlighting critical clauses that require special attention (e.g. interest and penalty rates, repayment terms) <p>Module 4: Verification and Authenticity</p> <ul style="list-style-type: none"> ○ Techniques for verifying the authenticity of documents ○ Common red flags in fraudulent documents ○ Case studies of document fraud ○ Emphasis on critical role of document verifiers in maintaining compliance and ensuring security ○ Introduction to verification techniques such as cross-referencing with different database (e.g., credit bureaus, government records) for enhanced verification 	
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Module 5: Legal Implications and Responsibilities

- Understanding Liability and Obligation
- Enforceability of contracts
- Consequences of non-compliance

Module 6: Best Practices in Document Management

- Document retention policies
- Digital versus physical documentation
- Security measures to protect sensitive information

Module 7: Emerging Trends and Technologies

- E-signature and digital contracts
- Blockchain technology in document verification
- Regulatory changes affecting documentation
- Overview of how Artificial Intelligence (AI) and Machine Learning (ML) technologies are used to detect fraud and improve the accuracy of document verification

Module 8: Understanding Standard Operating Procedures

- Step-by-step processes for verifying key financial documents
- Use of checklist and standard operating procedures (SOPs) to ensure consistency and thoroughness
- Guidance on integrating verification steps into daily workflows

**The proposed Course Module/Outline from the provider should align with the provided guide course description, objectives and outline*

METHODOLOGY

- **Lectures and presentations** on principles and techniques
- **Practical Exercises** and case studies
- **Q&A sessions** for participants to ask questions and discuss real-timed scenarios
- **Conclusions** and resumes to give summary of takeaways and additional resources for further learning

<p><u>DELIVERABLES</u></p> <ul style="list-style-type: none"> • Handouts • Certificates of Attendance (<i>within 5 working days after the conduct of the training program</i>) • Evaluation Report (<i>Documentation of training – observations and recommendations of the facilitator</i>) <p><u>SCHEDULE, PARTICIPANTS AND MODALITY</u></p> <p>Total Number of Participants: Two hundred seventy-one (271) participants</p>	
<p>Participants per day: Three (3) batches (Ninety (90) participants per batch)</p> <p>Duration: One (1) day (9:00 am to 5:00 pm)</p> <p>Schedule: To be agreed upon by both parties (2nd week of November 2024)</p> <p>Modality: Face-to-face (<i>for Makati Head Office participants</i>) and Virtual/online via Zoom application (<i>for other participants in Makati Head Office and all Area and Desk Offices</i>)</p>	
<p><u>BUDGET</u></p> <p>Five hundred thousand pesos (₱500,000.00) inclusive of taxes and surcharges, and training materials</p>	
<p><u>TECHNICAL EVALUATION</u></p> <ul style="list-style-type: none"> • Program Content/Module must be responsive to the requirements of SB Corporation • Profile of the Individual/Assigned Facilitator(s) i.e. experience, expertise, engagement • Individual/Assigned Facilitator(s) must have the following qualifications: <ul style="list-style-type: none"> ❖ Conducted similar training(s) within the last six (6) years i.e. from 2018 to 2024 	

<p>❖ Conducted similar training(s) for banking/financial/government institution(s)</p> <p><u>FINANCIAL EVALUATION</u></p> <p>The score will be based on the quoted price. Formula: Bidder = “n” points where n = [Quoted Price of Lower Bidder + Quoted Price of the Bidder Being Rated) x 20%] x 100</p> <p><u>DOCUMENTARY REQUIREMENTS</u></p> <ul style="list-style-type: none"> • Proposed Program Content/Module indicating course outline, objectives, methodology and deliverables • PhilGEPS Registration • Company Profile • Curriculum Vitae of individual/assigned facilitator(s) with the following information: <ul style="list-style-type: none"> ❖ Educational background ❖ Work and/or Consultancy experience ❖ Projects undertaken (indicating year conducted and name of clients) • Mayor’s/Business Permit • BIR2303 - Certificate of Registration • Income/Business Tax Return (updated) • Notarized Omnibus Sworn Statement, together with true copy of Secretary’s Certificate (for corporations) 	
<p>DELIVERY REQUIREMENT</p>	

a) 1 lot	
b) 18 Flr, 139 Corporate Center, 139 Valero St., Salcedo Village, Makati City	
c) Terms of Payment: 20 days upon receipt of billing	

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 (Php500,000.00) 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.

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: _____