



**Social Security System**  
East Avenue, Diliman, Quezon City

# **PHILIPPINE BIDDING DOCUMENTS**

**Fifth Edition**

## **PART I**

# **Procurement of CONSULTING SERVICES**

**2020 3<sup>rd</sup> Party with ISO Customer  
Satisfaction Surveys**

**REI-SSS-Consulting-2020-007**

**Government of the Republic of the Philippines**  
**October 2020**

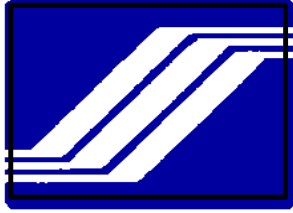
**MARISOL E. RIVERA**  
**Chairperson, TWG**

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# Section I. Request for Expression of Interest



REPUBLIC OF THE PHILIPPINES  
**SOCIAL SECURITY SYSTEM**

East Avenue, Diliman, Quezon City

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## REQUEST FOR EXPRESSION OF INTEREST FOR REI-Consulting-2020-007

### 2020 3<sup>RD</sup> PARTY WITH ISO CUSTOMER SATISFACTION SURVEYS

1. The *Social Security System (SSS)* through the Approved 2020 Corporate Operating Budget - MOOE – included in the Update for the month June (6<sup>th</sup> Update) on the 2020 APP intends to apply the sum of **P 6,850,000.00** being the Approved Budget for the Contract (ABC) to payments under the contract for the **2020 3<sup>rd</sup> Party with ISO Customer Satisfaction Surveys**. Bids received in excess of the ABC shall be automatically rejected at the opening of the financial proposals.
2. The *Social Security System* now calls for the submission of eligibility documents for **the conduct of a one-shot 3<sup>rd</sup> Party with ISO Customer Satisfaction Surveys, to measure the satisfaction of SSS members on its services and 12 programs/benefits to include Contributions, Registration, Loan Repayments, Salary Loan, Pension Loan Program, Sickness Benefit, Annual Confirmation of Pensioners, Maternity Benefit, Retirement Benefit, Death Benefit, Funeral Benefit and Disability Benefit.**

The sample size shall be:

TOTAL RESPONDENTS – 6,550		
For the 3 <sup>rd</sup> Party Survey	3,500 respondents	<ul style="list-style-type: none"> <li>• 3,000 from the Employed, Voluntary and Self-Employed members as one group (General Public)</li> <li>• 500 from the Employers (Businesses), as another group</li> </ul>
For the ISO survey	3,050 respondents at 50 respondents each for the eleven (11) ISO Branches	<ul style="list-style-type: none"> <li>• The ISO surveys shall be embedded in the 3<sup>rd</sup> Party Survey by increasing the sample size of each branch to a minimum of 50 respondents</li> </ul>

The Consultant shall ensure that each program sub-segment shall have a minimum of 100 respondents (e.g. per program or per branch). It shall be conducted in all 177 SSS Branches (as of December 2019). The distribution of the sample shall be based on the number of transactions of the branches. The Consultant shall determine the representative sample size from each branch and per program. The branches are classified according to size: 113 Small, 44 Medium, 16 Large and 4 Mega.

Eligibility documents of interested consultants must be duly received by the BAC Secretariat **on or before 22 October 2020 (Monday) not later than 2:00 p.m. at the BAC Bidding Room (formerly CDRPD Computer Room), 2<sup>nd</sup> Floor, SSS Main Building, East Avenue, Diliman, Quezon City.** Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.

**Only one company representative is allowed to attend the manual opening of Eligibility Documents. Other company representative may witness the opening of Eligibility Documents through Microsoft Teams. Kindly e-mail us on or before 20 October 2020, through e-mail address bac@sss.gov.ph, the following:**

- a. **Name of the representative and e-mail address; and**
  - b. **Technical and administrative queries.**
3. Interested bidders may obtain further information from the SSS and inspect the Bidding Documents at the address given below from Monday to Friday, 8:00 a.m. to 5:00 p.m.
  4. **A complete set of Bidding Documents may be acquired by interested bidders starting 14 October 2020** up to the scheduled submission & opening of eligibility documents from the address stated in the last item of the ITB.

Payment of **₱7,000.00** for the Bidding Documents shall be paid by the Shortlisted Consultant’s only.

It may also be **downloaded free of charge** from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.

5. The BAC shall draw up the short list of consultants from those who have submitted Expression of Interest, including the eligibility documents, and have been determined as eligible in accordance with the provisions of Republic Act 9184 (RA 9184), otherwise known as the “Government Procurement Reform Act”, and its Implementing Rules and Regulations (IRR).

The short list shall consist of three (3) prospective bidders who will be entitled to submit bids. The criteria and rating system for short listing are:

<b>CRITERIA</b>	<b>Points per Category</b>	<b>Maximum Points</b>
<b>1. APPLICABLE EXPERIENCE</b>		<b>(30%)</b>
The firm should be in existence for at least 3 years prior to shortlisting. If below 3 years, it shall not be included in the shortlisting. It shall also have the following experience:		
a. Has conducted a nationwide <b>customer satisfaction survey (CSAT)</b> , in-depth and comprehensive, within the last three years prior to bidding		<b>20%</b>
• With 4 or <b>more completed CSAT</b>	20	
• With 2-3 completed <b>CSAT</b>	15	
• With 1 completed <b>CSAT</b>	10	
b. Has conducted a nationwide social survey, which is not a market research within the last three years prior to bidding		<b>10%</b>
• With more than 1 nationwide social research survey	10	
• With 1 nationwide social research survey	5	

CRITERIA	Points per Category	Maximum Points
<b>2. QUALIFICATION OF PERSONNEL</b>		<b>(30%)</b>
<p>The firm must have the 4 required personnel who meets the required number of years experience, to be shortlisted. If the minimum years experience is not met, the firm will be disqualified from bidding.</p> <p>1 – Project Manager (minimum 5 years experience)  1 – Statistician (minimum 3 years experience)  1 – In-house Field Manager (minimum 1 year experience)  1 – Quality Controller (minimum 1 year experience )</p>		
<ul style="list-style-type: none"> <li>• <b>Project Manager</b> <ul style="list-style-type: none"> <li>○ With 10 years or more experience</li> <li>○ With 6-9 years experience</li> <li>○ With 5 years experience</li> </ul> </li> </ul>	<b>10</b> <b>7</b> <b>5</b>	
<ul style="list-style-type: none"> <li>• <b>Statistician</b> <ul style="list-style-type: none"> <li>○ With more than 5 years experience</li> <li>○ With 4-5 years experience</li> <li>○ With 3 years experience</li> </ul> </li> </ul>	<b>10</b> <b>7</b> <b>5</b>	
<ul style="list-style-type: none"> <li>• <b>With 1 year experience as Field Supervisor</b> <ul style="list-style-type: none"> <li>○ With 5 years or more experience</li> <li>○ With 2-4 years experience</li> <li>○ With 1 year experience</li> </ul> </li> </ul>	<b>5</b> <b>3</b> <b>1</b>	
<ul style="list-style-type: none"> <li>• <b>With 1 year experience as Quality Controller</b> <ul style="list-style-type: none"> <li>○ With 5 years or more experience</li> <li>○ With 2-4 years experience</li> <li>○ With 1 year experience</li> </ul> </li> </ul>	<b>5</b> <b>3</b> <b>1</b>	
<b>3. CURRENT WORKLOAD RELATIVE TO CAPACITY</b>		<b>(30%)</b>
<p>Number of on-going CSAT/social research surveys  (including projects awarded but not yet started)</p> <p>-----</p> <p>Number of all employed personnel</p>		
<ul style="list-style-type: none"> <li>• Highest capacity (lowest score)</li> <li>• Next highest (next lowest score)</li> <li>• Lowest (highest score)</li> </ul>	<b>30</b> <b>20</b> <b>10</b>	
<b>4. Member of ESOMAR (World Association of Opinion and Marketing Research Professionals), MORES (Marketing and Opinion Research Society of the Phil.) or PSSC (Philippine Social Science Council)</b>		<b>(10%)</b>
<ul style="list-style-type: none"> <li>• Member</li> <li>• Not a Member</li> </ul>	10 0	
<b>Total</b>		<b>100%</b>
<b>Passing rate is</b>		<b>75%</b>

6. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the IRR of RA 9184.

Bidding is restricted to Filipino citizens/sole proprietorships, cooperatives, and partnerships or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines.

7. The Procuring Entity shall evaluate bids using the Quality-Cost Based Evaluation/Selection (QCBE/QCBS) procedure. The Procuring Entity shall indicate the weights to be allocated for the Technical and Financial Proposals]. The criteria and rating system for the evaluation of bids shall be provided in the Instructions to Bidders and Bid Data Sheets (BDS) clause 25.1.
8. The contract shall be completed within three and a half (3.5) months, details below:
  - Fieldwork of the survey : Fifty (50) working days from receipt of the Consultant of a duly notarized copy of the MOA, Notice of Award and Notice to Proceed
  - Submission of Project Report, survey data and findings, data tables and charts in soft and hard copy : One month after end of Fieldwork
  - Briefing of the results to the Management Committee (MANCOM) and/or Social Security Commission (SSC) by the Consultant : Within fifteen (15) days from Receipt of Project Report by SSS or on a mutually agreed date

Estimated time for project to be completed: 3.5 months

9. References to the dates and times shall be based on Philippine Standard time. Should any of the above dates fall on a holiday, the deadline shall be extended to the same time on the immediately succeeding business day in Quezon City.
10. The SSS reserves the right to reject any and all bids, declare a failure of bidding, or not award the contract at any time prior to contract award in accordance with Section 41 of RA 9184 and its IRR, without thereby incurring any liability to the affected bidder or bidders.
11. The SSS assumes no obligation to compensate or indemnify parties for any expenses or loss that they may incur as a result of their participation in the procurement process, nor does SSS guarantees that an award will be made as a result of this invitation. Furthermore, the SSS reserves the right to waive any defects or formality in the responses to the eligibility requirements and to this invitation and reserves the right to accept the proposal most advantageous to the agency.
12. For further information, please refer to:

**Bids & Awards Committee**

**The Secretariat**

2<sup>nd</sup> Flr., SSS Main Bldg., East Ave., Diliman, Q.C.

Tel No. (632) 8922-1070; 8920-6401 local 5492 or 6382

Email – bac@sss.gov.ph

  
**THE CHAIRPERSON**  
**BIDS & AWARDS COMMITTEE**



# *Section II. Eligibility Documents*

## **1. Eligibility Criteria**

- 1.1. The following persons/entities shall be allowed to participate in the bidding for Consulting Services:
- (a) Duly licensed Filipino citizens/sole proprietorships;
  - (b) Partnerships duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the interest belongs to citizens of the Philippines;
  - (c) Corporations duly organized under the laws of the Philippines and of which at least sixty percent (60%) of the outstanding capital stock belongs to citizens of the Philippines;
  - (d) Cooperatives duly organized under the laws of the Philippines; or
  - (e) Persons/entities forming themselves into a joint venture, *i.e.*, a group of two (2) or more persons/entities that intend to be jointly and severally responsible or liable for a particular contract: Provided, however, That Filipino ownership or interest thereof shall be at least sixty percent (60%). For this purpose, Filipino ownership or interest shall be based on the contributions of each of the members of the joint venture as specified in their JVA.
- 1.2. When the types and fields of Consulting Services involve the practice of professions regulated by law, those who will actually perform the services shall be Filipino citizens and registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions specified in the **EDS**.
- 1.3. If the Request for Expression of Interest allows participation of foreign consultants, prospective foreign bidders may be eligible subject to the conditions stated in the **EDS**.
- 1.4. Government owned or –controlled corporations (GOCCs) may be eligible to participate only if they can establish that they (a) are legally and financially autonomous, (b) operate under commercial law, and (c) are not attached agencies of the Procuring Entity.

## **2. Eligibility Requirements**

- 2.1. The following eligibility requirements, together with the Eligibility Documents Submission Form, shall be submitted on or before the date of the eligibility check specified in the Request for Expression of Interest and Clause 5 for purposes of determining eligibility of prospective bidders:
- (a) Class “A” Documents –  
  
*Legal Documents*
    - (i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR. For procurement to be performed overseas, it shall be subject to the Guidelines to be issued by the GPPB.

### Technical Documents

- (ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the **EDS**. The statement shall include, for each contract, the following:
  - (ii.1) the name and location of the contract;
  - (ii.2) date of award of the contract;
  - (ii.3) type and brief description of consulting services;
  - (ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)
  - (ii.5) amount of contract;
  - (ii.6) contract duration; and
  - (ii.7) certificate of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a completed contract;
- (iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.

(b) Class "B" Document –

If applicable, the Joint Venture Agreement (JVA) in case the joint venture is already in existence, or duly notarized statements from all the potential joint venture partners in accordance with Section 24.1(b) of the IRR of RA 9184.

- 2.2. The eligibility requirements or statements, the bids, and all other documents to be submitted to the BAC must be in English. If the eligibility requirements or statements, the bids, and all other documents submitted to the BAC are in foreign language other than English, it must be accompanied by a translation of the documents in English. The documents shall be translated by the relevant foreign government agency, the foreign government agency authorized to translate documents, or a registered translator in the foreign bidder's country; and shall be authenticated by the appropriate Philippine foreign service establishment/post or the equivalent office having jurisdiction over the foreign bidder's affairs in the Philippines. The English translation shall govern, for purposes of interpretation of the bid.
- 2.3. Prospective bidders may obtain a full range of expertise by associating with individual consultant(s) and/or other consultants or entities through a JV or subcontracting arrangements, as appropriate. However, sub consultants may only participate in the bid of one short listed consultant. Foreign Consultants shall seek the participation of Filipino Consultants by entering into a JV with, or subcontracting part of the project to, Filipino Consultants.



### **3. Format and Signing of Eligibility Documents**

- 3.1. Prospective bidders shall submit their eligibility documents through their duly authorized representative on or before the deadline specified in Clause 5.
- 3.2. Prospective bidders shall prepare an original and copies of the eligibility documents. In the event of any discrepancy between the original and the copies, the original shall prevail.
- 3.3. The Eligibility Documents Submission Form shall be signed by the duly authorized representative/s of the Bidder. Failure to do so shall be a ground for the rejection of the eligibility documents.
- 3.4. Any interlineations, erasures, or overwriting shall be valid only if they are signed or initialed by the duly authorized representative/s of the prospective bidder.

### **4. Sealing and Marking of Eligibility Documents**

- 4.1. Prospective bidders shall enclose their original eligibility documents described in Clause 2.1, in a sealed envelope marked “ORIGINAL – ELIGIBILITY DOCUMENTS”. Each copy thereof shall be similarly sealed duly marking the envelopes as “COPY NO. \_\_\_ - ELIGIBILITY DOCUMENTS”. These envelopes containing the original and the copies shall then be enclosed in one single envelope.
- 4.2. The original and the number of copies of the eligibility documents as indicated in the **EDS** shall be typed or written in ink and shall be signed by the prospective bidder or its duly authorized representative/s.
- 4.3. All envelopes shall:
  - (a) contain the name of the contract to be bid in capital letters;
  - (b) bear the name and address of the prospective bidder in capital letters;
  - (c) be addressed to the Procuring Entity’s BAC specified in the **EDS**;
  - (d) bear the specific identification of this Project indicated in the **EDS**; and
  - (e) bear a warning “DO NOT OPEN BEFORE...” the date and time for the opening of eligibility documents, in accordance with Clause 5.
- 4.4. Eligibility documents that are not properly sealed and marked, as required in the bidding documents, shall not be rejected, but the bidder or its duly authorized representative shall acknowledge such condition of the documents as submitted. The BAC shall assume no responsibility for the misplacement of the contents of the improperly sealed or marked eligibility documents, or for its premature opening.

### **5. Deadline for Submission of Eligibility Documents**

Eligibility documents must be received by the Procuring Entity’s BAC at the address and on or before the date and time indicated in the Request for Expression of Interest and the **EDS**. In case the deadline for submission of bids fall on a non-working day duly declared by the president, governor or mayor or other government official authorized to make such declaration, the deadline shall be the next working day.

## **6. Late Submission of Eligibility Documents**

Any eligibility documents submitted after the deadline for submission and receipt prescribed in Clause 5 shall be declared “Late” and shall not be accepted by the Procuring Entity. The BAC shall record in the minutes of submission and opening of eligibility documents, the Bidder’s name, its representative and the time the eligibility documents were submitted late.

## **7. Modification and Withdrawal of Eligibility Documents**

- 7.1. The prospective bidder may modify its eligibility documents after it has been submitted; provided that the modification is received by the Procuring Entity prior to the deadline specified in Clause 5. The prospective bidder shall not be allowed to retrieve its original eligibility documents, but shall be allowed to submit another set equally sealed, properly identified, linked to its original bid marked as “ELIGIBILITY MODIFICATION” and stamped “received” by the BAC. Modifications received after the applicable deadline shall not be considered and shall be returned to the prospective bidder unopened.
- 7.2. A prospective bidder may, through a letter of withdrawal, withdraw its eligibility documents after it has been submitted, for valid and justifiable reason; provided that the letter of withdrawal is received by the Procuring Entity prior to the deadline prescribed for submission and receipt of eligibility documents.
- 7.3. Eligibility documents requested to be withdrawn in accordance with this Clause shall be returned unopened to the prospective bidder concerned. A prospective bidder that withdraws its eligibility documents shall not be permitted to submit another set, directly or indirectly, for the same project. A prospective bidder that acquired the eligibility documents may also express its intention not to participate in the bidding through a letter which should reach and be stamped by the BAC before the deadline for submission and receipt of eligibility documents.

## **8. Opening and Preliminary Examination of Eligibility Documents**

- 8.1. The BAC will open the envelopes containing the eligibility documents in the presence of the prospective bidders’ representatives who choose to attend, at the time, on the date, and at the place specified in the **EDS**. The prospective bidders’ representatives who are present shall sign a register evidencing their attendance.

In case the submitted eligibility envelopes cannot be opened as scheduled due to justifiable reasons, the BAC shall take custody of the said envelopes and reschedule the opening on the next working day or at the soonest possible time through the issuance of a Notice of Postponement to be posted in the PhilGEPS website and the website of the Procuring Entity concerned.

- 8.2. Letters of withdrawal shall be read out and recorded during the opening of eligibility documents and the envelope containing the corresponding withdrawn eligibility documents shall be returned unopened to the withdrawing prospective bidder.
- 8.3. The eligibility documents envelopes and modifications, if any, shall be opened one at a time, and the following read out and recorded:
  - (a) the name of the prospective bidder;
  - (b) whether there is a modification or substitution; and
  - (c) the presence or absence of each document comprising the eligibility documents vis-à-vis a checklist of the required documents.

- 8.4. The eligibility of each prospective bidder shall be determined by examining each bidder's eligibility requirements or statements against a checklist of requirements, using non-discretionary "pass/fail" criterion, as stated in the Request for Expression of Interest, and shall be determined as either "eligible" or "ineligible." If a prospective bidder submits the specific eligibility document required, he shall be rated "passed" for that particular requirement. In this regard, failure to submit a requirement, or an incomplete or patently insufficient submission, shall be considered "failed" for the particular eligibility requirement concerned. If a prospective bidder is rated "passed" for all the eligibility requirements, he shall be considered eligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "eligible." If a prospective bidder is rated "failed" in any of the eligibility requirements, he shall be considered ineligible to participate in the bidding, and the BAC shall mark the set of eligibility documents of the prospective bidder concerned as "ineligible." In either case, the BAC chairperson or his duly designated authority shall countersign the markings.

## **9. Short Listing of Consultants**

- 9.1. Only prospective bidders whose submitted contracts are similar in nature and complexity to the contract to be bid as provided in the **EDS** shall be considered for short listing.
- 9.2. The BAC shall draw up the short list of prospective bidders from those declared eligible using the detailed set of criteria and rating system to be used specified in the **EDS**.
- 9.3. Short listed consultants shall be invited to participate in the bidding for this project through a Notice of Eligibility and Short Listing issued by the BAC.

## **10. Protest Mechanism**

Decision of the Procuring Entity at any stage of the procurement process may be questioned in accordance with Section 55 of the IRR of RA 9184.

## *Section III. Eligibility Data Sheet*

<b>Eligibility Documents</b>	
1.2	<i>Management and Related Services for the 3<sup>rd</sup> Party with ISO Customer Satisfaction Surveys</i>
1.3	No further instructions
2	<p><b>Eligibility Requirements:</b></p> <p><u>Legal Documents</u></p> <p>(i) PhilGEPS Certificate of Registration and Membership in accordance with Section 8.5.2 of the IRR. For procurement to be performed overseas, it shall be subject to the Guidelines to be issued by the GPPB.</p> <p><u>Technical Documents</u></p> <p>(ii) Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period provided in the <b>EDS</b>. The statement shall include, for each contract, the following:</p> <ul style="list-style-type: none"> <li>(ii.1) the name and location of the contract;</li> <li>(ii.2) date of award of the contract;</li> <li>(ii.3) type and brief description of consulting services;</li> <li>(ii.4) consultant's role (whether main consultant, subconsultant, or partner in a JV)</li> <li>(ii.5) amount of contract;</li> <li>(ii.6) contract duration; and</li> <li>(ii.7) certificate of satisfactory completion or equivalent document specified in the <b>EDS</b> issued by the client, in the case of a completed contract;</li> <li>(ii.8) Certificate of membership to ESOMAR (World Association of Opinion and Marketing Research Professionals), MORES (Marketing and Opinion Research Society of the Philippines) or PSSC (Philippine Social Science Council).</li> </ul> <p>(iii) Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2, including their respective curriculum vitae.</p>

	<p>(iv) If applicable, the Joint Venture Agreement (JVA) in case the joint venture is already in existence, or duly notarized statements from all the potential joint venture partners in accordance with Section 24.1(b) of the IRR of RA 9184.</p> <p>(v) Eligibility Document Submission Form (form Supplied)</p>
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within <i>a period of three (3) years</i> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	“Certificate of Completion” for completed contracts from previous clients with contact person’s name and phone numbers.
4.2	<p>Each Bidder shall submit five (5) sets.</p> <p>1. One (1) Envelope marked ORIGINAL; and</p> <p>2. Four (4) Envelopes marked COPY NO. ____.</p>
(c)	The Social Security System Bids and Awards Committee shall be concerned with the Project.
4.3 (d)	<p>The winning Consultant shall conduct of a one-shot Customer Satisfaction Survey to measure the satisfaction of SSS members on its services and 12 programs/benefits to include Contributions, Registration, Loan Repayments, Salary Loan, Sickness Benefit, Annual Confirmation of Pensioners, Maternity Benefit, Retirement Benefit, Death Benefit, Funeral Benefit and Disability Benefit.</p> <p>The sample size shall be 3,000 to come from the Employed, Voluntary and Self-Employed members as one group (General Public), and 500 from the Employers (Businesses), as another group. The ISO component will have an additional</p> <p>The embedded ISO surveys shall have a minimum of 50 respondents for each of the 61 branches, for baseline and maintenance surveys for a total 6,550 respondents for the 3rd Party Customer Satisfaction Survey.</p> <p>However, the Consultant shall ensure that each program sub-segment shall have a minimum of 100 respondents (e.g. per program or per branch). It shall be conducted in all 177 SSS branches (as of December 2019). The distribution of the sample shall be based on the number of transactions of the branches. The Consultant shall determine the representative sample size from each branch and per program. The branches are classified according to size: 113 Small, 44 Medium, 16 Large and 4 Mega.</p> <p>The Consultant will undertake the Research Design, Preparation and Reproduction of Questionnaires; Translation of Questionnaire to dialects (if necessary); Briefing and Training of Field Interviewers; Actual Field Interviews; Field Quality Control; Data Processing, Validation and Generation of Data Tables; Report Writing and Analysis; Oral Presentation of Research Findings for:</p> <p><b>A. SCOPE:</b></p> <ul style="list-style-type: none"> <li>• Nationwide (177 branches)</li> </ul>

	<p><b>B. OBJECTIVE</b></p> <p>To measure the members’ satisfaction of SSS’ services and their satisfaction on the twelve (12) programs/benefits:</p> <ol style="list-style-type: none"> <li>1. Registration</li> <li>2. Contribution</li> <li>3. Loan Repayment</li> <li>4. Salary Loan</li> <li>5. Sickness Benefit</li> <li>6. Annual Confirmation of Pensioners</li> <li>7. Maternity Benefit</li> <li>8. Retirement Benefit</li> <li>9. Death Benefit</li> <li>10. Funeral Benefit</li> <li>11. Disability Benefit</li> <li>12. Pension Loan Program</li> </ol> <p><b>Based on---</b></p> <ol style="list-style-type: none"> <li>a. Frontline Services <ul style="list-style-type: none"> <li>- Queuing System/Waiting time</li> <li>- Counter Servicing Time</li> <li>- Frontline Employees’ attitude</li> <li>- Physical Facilities</li> </ul> </li> <li>b. Turn-around/Processing Time <ul style="list-style-type: none"> <li>- Processing Time of Benefit Claims/Salary Loan</li> <li>- Information on Requirements (accuracy/completeness/standardized instructions/documents required/ease of filling-up forms)</li> </ul> </li> <li>c. Complaints Resolution</li> </ol> <p><b>C. ANALYSIS</b></p> <p>Present an analysis of:</p> <ul style="list-style-type: none"> <li>- separate analyses for customer satisfaction, and, customer dissatisfaction using top/lowest two (2) boxes;</li> <li>- expectations and motivations and drivers on SSS as an institution, and on per program, per division basis for the 3<sup>rd</sup> Party survey, and, on a per branch basis for the 61 enumerated ISO branches; Modified Kruskal Analysis; Scatter Diagram to derive importance of each attribute;</li> <li>- Averaging of Overall Satisfaction rating. Top branches with 97% above ratings should be highlighted;</li> <li>- Net Promoter Score (Promoters – Detractors)</li> <li>- Customer Effort Score (Ease of Doing Business)</li> <li>- comparative analysis of previous surveys and current survey.</li> </ul>
5	<p>The address for submission of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b>  2<sup>nd</sup> Floor, BAC, SSS Main Building  East Avenue, Diliman, Quezon City</p> <p><b>The deadline for submission of eligibility documents is indicated in the Advertisement.</b></p>

8.1	<p>The place of opening of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b>  2<sup>nd</sup> Floor, BAC, SSS Main Building  East Avenue, Diliman, Quezon City</p> <p><b>The date and time of opening of eligibility documents is indicated in the Advertisement.</b></p>																														
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9.2	<p><b>Below is the Criteria for Shortlisting and point system:</b></p> <p style="text-align: center;"><b>CRITERIA FOR SHORTLISTING</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%; text-align: center;">CRITERIA</th> <th style="width: 20%; text-align: center;">Points per Category</th> <th style="width: 20%; text-align: center;">Maximum Points</th> </tr> </thead> <tbody> <tr> <td colspan="3"> <p><b>1. APPLICABLE EXPERIENCE (30%)</b></p> <p>The firm should be in existence for at least 3 years prior to shortlisting. If below 3 years, it shall not be included in the shortlisting. It shall also have the following experience:</p> </td> </tr> <tr> <td> <p>a. Has conducted a nationwide <b>customer satisfaction survey (CSAT)</b>, in-depth and comprehensive, within the last three years prior to bidding</p> </td> <td></td> <td style="text-align: center;"><b>20%</b></td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>• With 4 or more completed CSAT</li> </ul> </td> <td style="text-align: center;">20</td> <td></td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>• With 2-3 completed CSAT</li> </ul> </td> <td style="text-align: center;">15</td> <td></td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>• With 1 completed CSAT</li> </ul> </td> <td style="text-align: center;">10</td> <td></td> </tr> <tr> <td> <p>b. Has conducted a nationwide social survey, which is not a market research within the last three years prior to bidding</p> </td> <td></td> <td style="text-align: center;"><b>10%</b></td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>• With more than 1 nationwide social research survey</li> </ul> </td> <td style="text-align: center;">10</td> <td></td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>• With 1 nationwide social research survey</li> </ul> </td> <td style="text-align: center;">5</td> <td></td> </tr> <tr> <td colspan="3"> <p><b>2. QUALIFICATION OF PERSONNEL (30%)</b></p> <p>The firm must have the 4 required personnel who meets the required number of years experience, to be shortlisted. If the minimum years experience is not met, the firm will be disqualified from bidding.</p> <p>1 – Project Manager (minimum 5 years experience)  1 – Statistician (minimum 3 years experience)  1 – In-house Field Manager (minimum 1 year experience)  1 – Quality Controller (minimum 1 year experience )</p> </td> </tr> </tbody> </table>	CRITERIA	Points per Category	Maximum Points	<p><b>1. APPLICABLE EXPERIENCE (30%)</b></p> <p>The firm should be in existence for at least 3 years prior to shortlisting. If below 3 years, it shall not be included in the shortlisting. It shall also have the following experience:</p>			<p>a. Has conducted a nationwide <b>customer satisfaction survey (CSAT)</b>, in-depth and comprehensive, within the last three years prior to bidding</p>		<b>20%</b>	<ul style="list-style-type: none"> <li>• With 4 or more completed CSAT</li> </ul>	20		<ul style="list-style-type: none"> <li>• With 2-3 completed CSAT</li> </ul>	15		<ul style="list-style-type: none"> <li>• With 1 completed CSAT</li> </ul>	10		<p>b. Has conducted a nationwide social survey, which is not a market research within the last three years prior to bidding</p>		<b>10%</b>	<ul style="list-style-type: none"> <li>• With more than 1 nationwide social research survey</li> </ul>	10		<ul style="list-style-type: none"> <li>• With 1 nationwide social research survey</li> </ul>	5		<p><b>2. QUALIFICATION OF PERSONNEL (30%)</b></p> <p>The firm must have the 4 required personnel who meets the required number of years experience, to be shortlisted. If the minimum years experience is not met, the firm will be disqualified from bidding.</p> <p>1 – Project Manager (minimum 5 years experience)  1 – Statistician (minimum 3 years experience)  1 – In-house Field Manager (minimum 1 year experience)  1 – Quality Controller (minimum 1 year experience )</p>		
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<ul style="list-style-type: none"> <li>• <b>With 1 year experience as Field Supervisor</b> <ul style="list-style-type: none"> <li>○ With 5 years or more experience</li> <li>○ With 2-4 years experience</li> <li>○ With 1 year experience</li> </ul> </li> </ul>	<b>5</b> <b>3</b> <b>1</b>	
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<b>3. CURRENT WORKLOAD RELATIVE TO CAPACITY</b>		<b>(30%)</b>
Number of on-going CSAT/social research surveys (including projects awarded but not yet started)  ----- Number of all employed personnel		
<ul style="list-style-type: none"> <li>• Highest capacity (lowest score)</li> <li>• Next highest (next lowest score)</li> <li>• Lowest (highest score)</li> </ul>	<b>30</b> <b>20</b> <b>10</b>	
<b>4. Member of ESOMAR (World Association of Opinion and Marketing Research Professionals), MORES (Marketing and Opinion Research Society of the Phil.) or PSSC (Philippine Social Science Council)</b>		<b>(10%)</b>
<ul style="list-style-type: none"> <li>• Member</li> <li>• Not a Member</li> </ul>	<b>10</b> <b>0</b>	
<b>Total</b>		<b>100%</b>
<b>Passing rate is</b>		<b>75%</b>



## ELIGIBILITY DOCUMENTS SUBMISSION FORM

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[Date]

[Name and address of the Procuring Entity]

Ladies/Gentlemen:

In connection with your Request for Expression of Interest dated [insert date] for [Title of Project], [Name of Consultant] hereby expresses interest in participating in the eligibility and short listing for said Project and submits the attached eligibility documents in compliance with the Eligibility Documents therefor.

In line with this submission, we certify that:

- a) [Name of Consultant] is not blacklisted or barred from bidding by the GoP or any of its agencies, offices, corporations, LGUs, or autonomous regional government, including foreign government/foreign or international financing institution; and
- b) Each of the documents submitted herewith is an authentic copy of the original, complete, and all statements and information provided therein are true and correct.
- c) That the company has been in existence since \_\_\_\_\_(year) as registered in SSS under Employer Number \_\_\_\_\_.
- d) That we have a total (\_\_\_\_\_) number of employees currently employed in the company.

We acknowledge and accept the Procuring Entity's right to inspect and audit all records relating to our submission irrespective of whether we are declared eligible and short listed or not.

We further acknowledge that failure to sign this Eligibility Document Submission Form shall be a ground for our disqualification.

Yours sincerely,

Signature  
Name and Title of Authorized Signatory  
Name of Consultant  
Address

**STATEMENT OF ON-GOING GOVERNMENT AND PRIVATE CONTRACTS WITH ATTACHED SUPPORTING DOCUMENTS (i.e. CONTRACTS)**

NAME OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER

**STATEMENT OF COMPLETED GOVERNMENT AND PRIVATE CONTRACTS WITH ATTACHED SUPPORTING DOCUMENTS (i.e. CONTRACTS AND PROOF OF ACCEPTANCE)**

NAME OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER

**STATEMENT OF SIMILAR GOVERNMENT AND PRIVATE CONTRACTS FOR CONSULTANCY**

NAME OF CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER

