



**Social Security System**

East Avenue, Diliman, Quezon City

# **PHILIPPINE BIDDING DOCUMENTS**

**Fifth Edition  
October 2016**

## **PART I**


# **Procurement of CONSULTING SERVICES**

**2022 3<sup>rd</sup> PARTY CUSTOMER SATISFACTION SURVEY**

**REI-SSS-CONSULTING-2022-010**

**Government of the Republic of the Philippines**

**SEPTEMBER 2022**

  
**Marisol E. Rivera**  
Chairperson, TWG

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*Section I. Request for Expression of  
Interest*



REPUBLIC OF THE PHILIPPINES  
**SOCIAL SECURITY SYSTEM**

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**REQUEST FOR EXPRESSION OF INTEREST  
REI-SSS-CONSULTING-2022-010**

**2022 3RD PARTY CUSTOMER SATISFACTIONSURVEY  
(RE-ADVERTISEMENT)**

1. The *Social Security System (SSS)*, through the Approved 2022 Corporate Operating Budget under MOOE included in the 2<sup>nd</sup> update for the month of May with Code PAP 2022-109A of the Annual Procurement Plan (APP) intends to apply the sum of TWO MILLION EIGHT HUNDRED EIGHTY-EIGHT THOUSAND SIX HUNDRED PESO (₱2,888,600.00) being the Approved Budget for the Contract (ABC) to payments under the contract for **2022 3<sup>rd</sup> Party Customer Satisfaction Survey (Re-Advertisement)**.

Bids received in excess of ₱2,888,600.00 as 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-time 3<sup>rd</sup> Party Customer Satisfaction Survey (CSAT), to measure the satisfaction of SSS members on its online services to include the programs/benefits Contributions, Registration, Loan Repayments, Short-term Loans, Pension Loan Program, Sickness Benefit, Maternity Benefit, Retirement Benefit, Funeral Benefit, Death Benefit, Unemployment Benefit and Annual Confirmation of Pensioners (ACOP) Program.

The sample size shall be 2,000:

- 1,500 from the Employed, Voluntary and Self-Employed members as one group (General Public)
- 500 from the Employers (Business), as another group

However, the Consultant shall ensure that each program sub-segment shall have a minimum of 100 respondents. The Consultant shall determine the sample size from each Division for proper representation of each area.

Eligibility documents of interested consultants must be duly received by the BAC Secretariat **on or before 10 October 2022 (Monday) not later than 2:00 p.m. at the Bidding Room, 2<sup>nd</sup> Floor, SSS Main Building, East Avenue, Quezon City**. Applications for eligibility will be evaluated based on a non-discretionary “pass/fail” criterion.

Interested consultant must be an independent research firm that has been established for at least **five (5) years prior to the submission and eligibility check and must have experience in the customer satisfaction survey**.

**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 07 October 2022, through e-mail address [bac@sss.gov.ph](mailto: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 SSS and inspect the Bidding Documents at the address in the last item of the ITB 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 **30 September 2022 up to the scheduled submission & opening of eligibility documents** from the address stated in the last item of the ITB.

Payment of **₱3,000** for the Bidding Documents shall be paid by the Shortlisted Consultant/s only.

The mode of payment will be on a cash basis payable at the SSS Cash Management Department, Ground Floor, SSS Main Building, upon accomplishment of SSS Form R-6. The Bidding Documents shall be received personally by the prospective Bidder or his authorized representative.

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 **seven (7) prospective bidders** who will be entitled to submit bids. The criteria and rating system for short listing are:

CRITERIA	Points per Category	Maximum Points
<b>1. APPLICABLE EXPERIENCE</b>		<b>30 pts</b>
The firm should be in existence for at least 5 years prior to shortlisting. If below 5 years, it shall not be included in the shortlisting.		
▪ With $\geq 5$ completed nationwide CSAT	30	
▪ With 2-4 completed nationwide CSAT	20	
▪ With 1 completed nationwide CSAT	10	
<b>2. QUALIFICATION OF PERSONNEL</b>		<b>30 pts</b>
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 by any of the required personnel, the firm will be disqualified from bidding. The required personnel are: 1 - Project Manager (minimum 5 years experience) 1 – Statistician (minimum 3 years experience) 1 – Quality Controller (minimum 1 year experience) 1 – Field Manager or Supervisor (minimum 1 year experience)		
<b>a. Project Manager</b>		
▪ With $\geq 10$ experience	15	
▪ With 6-9 years experience	10	
▪ With 5 years experience	7	
<b>b. Statistician</b>		
▪ With $> 5$ years experience	10	
▪ With 4-5 years experience	7	
▪ With 3 years experience	5	
<b>c. Field Manager or Supervisor</b>		
▪ With $\geq 5$ years experience	5	
▪ With 2-4 years experience	3	
▪ With 1 year experience	1	
<b>d. Quality Controller</b>		
▪ With 5 years or more experience	5	
▪ With 2-4 years experience	3	
▪ With 1 year experience	1	

<b>3. CURRENT WORKLOAD RELATIVE TO CAPACITY</b>		<b>30 pts</b>
Formula: $\frac{\text{Number of on-going CSAT surveys (including projects awarded but not yet started)}}{\text{Number of all employed personnel}}$		
• Highest capacity (lowest score)	30	
• Next highest (next lowest score)	25	
• Lowest (highest score)	20	
<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 pts</b>
• Member	10	
• Not a Member	0	
<b>Total</b>		<b>100 pts</b>

**Passing rate is 75%.**

6. Bidding will be conducted through open competitive bidding procedures using non-discretionary “pass/fail” criterion as specified in the IRR of RA 9184.
  - (i) 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 SSS shall evaluate bids using the *Quality-Cost Based Evaluation/Selection (QCBE/QCBS)* procedure. The weights to be allocated for the Technical and Financial Proposals are indicated in Clause 25.1, Section III, Bid Data Sheet, Part II of the Bidding Documents. The criteria and rating system for the evaluation of bids as indicated in the Instructions to Bidders are provided in Clause 25.1 and 26.2, Section III, Bid Data Sheet, Part II of the Bidding Documents.
8. The contract shall be completed within 75 calendar days or two and a half (2.5) months, details below:

ACTIVITY	TARGET PERIOD
a. Fieldwork of the survey	Thirty (30) calendar days, calculation shall start on the latest date the Consultant receives the complete set of the following documents:  1. duly notarized copy of the MOA, 2. Notice of Award, 3. Notice to Proceed, 4. approved questionnaires, and 5. list of consenting SSS members as probable survey respondents
b. Submission of Project Report including raw data and other project artifacts in hard and soft copy format	Thirty (30) calendar days after end of Fieldwork
c. Briefing of the results to Management Committee (ManCom)	Within fifteen (15) calendar days from receipt of Project Report by SSS or on a mutually agreed date with the ManCom
d. Estimated time to complete project	Seventy-five (75) calendar days (approximately 2.5 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 of 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 expense or loss that they may incur as a result of their participation in the procurement process, nor does SSS guarantee 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](mailto:bac@sss.gov.ph)
13. Bidding Documents may be downloaded from PROCUREMENT tab at [www.sss.gov.ph](http://www.sss.gov.ph) starting **30 September 2022**.



THE CHAIRPERSON  
BIDS & AWARDS COMMITTEE

ref.: rei-consulting-sss-2022-010-3<sup>rd</sup> Party CSAT Survey (ready)

## *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) certification of satisfactory completion or equivalent document specified in the **EDS** issued by the client, in the case of a complete 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.

However, for Contracting Parties to the Apostille Convention, the documents shall be authenticated through an apostille by the Competent Authority, except for countries identified by the Department of Foreign Affairs (DFA) that will still require legalization (red ribbon) by the relevant Embassy or Consulate.

A Contracting Party refers to a State that has joined the Apostille Convention, whether or not the Convention has entered into force for that State.

A Competent Authority refers to the authority designated by a Contracting Party that is competent to issue an apostille. A Contracting Party may designate one or more Competent Authorities and may designate Competent Authorities that are competent to issue an apostille for certain categories of public documents. Information about designated Competent Authorities may be found on the Apostille Section of the Hague Conference website under "Competent Authorities".

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, subconsultants 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 0 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***

# Eligibility Data Sheet

<b>Eligibility Documents</b>	
1.2	<i>Management and Related Services for the 2022 3<sup>rd</sup> Party Customer Satisfaction (CSAT) Survey</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> <p style="padding-left: 40px;">(ii.1) the name and location of the contract;</p> <p style="padding-left: 40px;">(ii.2) date of award of the contract;</p> <p style="padding-left: 40px;">(ii.3) type and brief description of consulting services;</p> <p style="padding-left: 40px;">(ii.4) consultant’s role (whether main consultant, sub-consultant, or partner in a JV)</p> <p style="padding-left: 40px;">(ii.5) amount of contract;</p> <p style="padding-left: 40px;">(ii.6) contract duration; and</p> <p style="padding-left: 40px;">(ii.7) certificate of satisfactory completion or equivalent document issued by the client, in the case of a completed contract;</p> <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 (form Supplied).</p> <p style="text-align: center;"><b><u>Aside from the required key personnel who will be assigned to the project, the Consultant is also required to enumerate all technical personnel/professionals that are employed by the Consultant, either as a regular employee or on a per-project basis, including their respective Curriculum Vitae.</u></b></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>

	(v) Eligibility Document Submission Form (form Supplied)
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 five (5) years</i> prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	<i>“Certificate of Completion” for completed contracts from previous clients with contact person’s name, email address and phone numbers.</i>
4.2	Each Bidder shall submit three (3) sets.  1. One (1) Envelope marked ORIGINAL; and  2. Two (2) Envelopes marked COPY NO.1 and 2.
4.3 (c)	The Social Security System's Bids and Awards Committee shall be concerned with the Project.
4.3 (d)	<p>The winning Consultant shall conduct a one-shot 3<sup>rd</sup> Party CSAT Survey, to measure the satisfaction of SSS members on its online services.</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> <p>The Survey will cover the online programs for:</p> <ol style="list-style-type: none"> <li>1. Registration</li> <li>2. Contribution</li> <li>3. Loan Repayment</li> <li>4. Short-term Loans (salary, calamity, educational)</li> <li>5. Pension Loan Program</li> <li>6. Sickness Benefit</li> <li>7. Maternity Benefit</li> <li>8. Retirement Benefit</li> <li>9. Funeral Benefit</li> <li>10. Death Benefit</li> <li>11. Annual Confirmation of Pensioners (ACOP)</li> <li>12. Unemployment Benefit</li> </ol> <p><b>B. SAMPLE SIZE:</b></p> <p>The sample size shall be 1,500 to come from the Employed, Voluntary and Self-Employed members as one group (General Public), and 500 from the Employers (Business), as another group.</p> <p>However, the Consultant shall ensure that each program sub-segment shall have a minimum of 100 respondents. The Consultant shall determine the sample size from each Division for proper representation of each area.</p> <p><b>C. OBJECTIVE</b></p> <p>The measure of satisfaction or dissatisfaction will be based on the metrics provided by the Governance Commission for GOCCs (GCG) and those directed by the Management Committee.</p> <p>They include the following:</p>



	<ul style="list-style-type: none"> <li>• Online Filing of Benefits, Loan applications, Registration/Membership</li> <li>• Turn-around/Processing Time</li> <li>• Online Support Services</li> <li>• Online Communication Channels</li> <li>• Online Complaints Handling and Resolution</li> </ul> <p><b>D. METHODOLOGY</b></p> <ul style="list-style-type: none"> <li>• Telephone interviews</li> </ul> <p><b>E. 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, motivations and drivers on SSS as an institution, and on per program basis; Modified Kruskal Analysis; Scatter Diagram to derive importance of each attribute;</li> <li>• Net Promoter Score (Promoters – Detractors), trend analysis</li> <li>• Customer Effort Score (Ease of Doing Business), trend analysis</li> <li>• comparative analysis of Overall Satisfaction (OSAT), previous vs. current</li> </ul>												
5	<p>The address for submission of eligibility documents is at:</p> <p><b>BIDS AND AWARDS COMMITTEE</b>  <i>2<sup>nd</sup> Floor, SSS Main Building</i>  <i>East Avenue, Diliman, Quezon City</i></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>  <i>Bidding Room, 2<sup>nd</sup> Floor, SSS Main Building</i>  <i>East Avenue, Diliman, Quezon City</i></p> <p>The date and time of opening of eligibility documents is indicated in the Advertisement.</p>												
9.1	<p>Similar contracts may be included and these contracts are defined as studies/researches done to learn about people and societies so that the researchers can design products and services that cater to various needs of the people. Example of such studies are product investigation and marketing strategies/trends.</p>												
9.2	<p>The following criteria and rating system shall be used for the short listing of consultants:</p> <table border="1" data-bbox="440 1999 1369 2475"> <thead> <tr> <th>CRITERIA</th> <th>POINTS</th> </tr> </thead> <tbody> <tr> <td>a. Applicable work experience of the consultant</td> <td>30</td> </tr> <tr> <td>b. Qualification of personnel who may be assigned to the job vis-a-vis extent and complexity of the undertaking</td> <td>30</td> </tr> <tr> <td>c. Current workload relative to capacity</td> <td>30</td> </tr> <tr> <td>d. Membership to ESOMAR World Association of Opinion and Marketing Research Professionals), MORES (Marketing and Opinion Research Society of the Phil.) or PSSC (Phil. Social Science Council)</td> <td>10</td> </tr> <tr> <td style="text-align: right;"><b>Total</b></td> <td><b>100</b></td> </tr> </tbody> </table> <p>The minimum score required to pass is <u>75</u> points.</p>	CRITERIA	POINTS	a. Applicable work experience of the consultant	30	b. Qualification of personnel who may be assigned to the job vis-a-vis extent and complexity of the undertaking	30	c. Current workload relative to capacity	30	d. Membership to ESOMAR World Association of Opinion and Marketing Research Professionals), MORES (Marketing and Opinion Research Society of the Phil.) or PSSC (Phil. Social Science Council)	10	<b>Total</b>	<b>100</b>
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<b>Total</b>	<b>100</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 2022 3rd Party Customer Satisfaction Survey, *[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 CONSULTANT SPECIFYING ITS NATIONALITY

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[Date]

### **SOCIAL SECURITY SYSTEM**

*East Avenue, Diliman, Quezon City*

Ladies/Gentlemen:

This is to certify that (Name of Bidder) is :

- a. (state Nationality) -owned company,
- b. *Select one and delete the others:*
  - ( ) citizens/sole proprietorships with at least (\_\_\_%) interest or outstanding capital stock belonging to citizens of the Philippines
  - ( ) cooperatives with at least (\_\_\_%) interest or outstanding capital stock belonging to citizens of the Philippines
  - ( ) partnerships or organizations with at least (\_\_\_%) interest or outstanding capital stock belonging to citizens of the Philippines.

Below are the list of consultants/professionals who will actually perform the service, are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions:

- 1.
- 2.
- 3.
- 4.
- 5.

This statement is being issued in compliance with the eligibility requirements for the bidding of the 2022 3rd Party Customer Satisfaction Survey.

Attached for your reference are the Curriculum Vitae of the above-mentioned personnel.

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 & LOCATION OF THE CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES <i>(specify if nationwide, regional, local)</i>	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER/ EMAIL

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

NAME & LOCATION OF THE CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES <i>(specify if nationwide, regional, local)</i>	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER/ EMAIL	CERTIFICATE OF SATISFACTORY COMPLETION OR EQUIVALENT DOCUMENT ISSUED BY THE CLIENT

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

NAME & LOCATION OF THE CONTRACT	DATE OF AWARD OF THE CONTRACT	CONTRACT DURATION	AMOUNT OF CONTRACT	TYPE AND BRIEF DESCRIPTION OF THE CONSULTING SERVICES <i>(specify if nationwide, regional, local)</i>	CONSULTANT'S ROLE (whether main consultant, subcontractor, or partner in JV) with CONTACT PERSON AND CONTACT NUMBER/ EMAIL

