

PHILIPPINE BIDDING DOCUMENTS

**Procurement of services for the
NATIONWIDE 2025 HARMONIZED CLIENT
SATISFACTION MEASUREMENT OF UCPB
SAVINGS BANK**

ITB-CPCD-HCSM-001-25-06-2025

Government of the Republic of the Philippines

*Approved Budget for the Contract is Two Million Five
Hundred Pesos only (Php2,500,000.00)*

**Sixth Edition
July 2020**

*Shirley
7/1/2020*

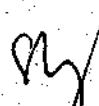
Preface

These Philippine Bidding Documents (PBDs) for the procurement of Goods through Competitive Bidding have been prepared by the Government of the Philippines for use by any branch, constitutional commission or office, agency, department, bureau, office, or instrumentality of the Government of the Philippines, National Government Agencies, including Government-Owned and/or Controlled Corporations, Government Financing Institutions, State Universities and Colleges, and Local Government Unit. The procedures and practices presented in this document have been developed through broad experience, and are for mandatory use in projects that are financed in whole or in part by the Government of the Philippines or any foreign government/foreign or international financing institution in accordance with the provisions of the 2016 revised Implementing Rules and Regulations of Republic Act No. 9184.

The Bidding Documents shall clearly and adequately define, among others: (i) the objectives, scope, and expected outputs and/or results of the proposed contract or Framework Agreement, as the case may be; (ii) the eligibility requirements of Bidders; (iii) the expected contract or Framework Agreement duration, the estimated quantity in the case of procurement of goods, delivery schedule and/or time frame; and (iv) the obligations, duties, and/or functions of the winning bidder.

Care should be taken to check the relevance of the provisions of the PBDs against the requirements of the specific Goods to be procured. If duplication of a subject is inevitable in other sections of the document prepared by the Procuring Entity, care must be exercised to avoid contradictions between clauses dealing with the same matter.

Moreover, each section is prepared with notes intended only as information for the Procuring Entity or the person drafting the Bidding Documents. They shall not be included in the final documents. The following general directions should be observed when using the documents:

- a. All the documents listed in the Table of Contents are normally required for the procurement of Goods. However, they should be adapted as necessary to the circumstances of the particular Procurement Project.
 - b. Specific details, such as the "*name of the Procuring Entity*" and "*address for bid submission*," should be furnished in the Instructions to Bidders, Bid Data Sheet, and Special Conditions of Contract. The final documents should contain neither blank spaces nor options.
 - c. This Preface and the footnotes or notes in italics included in the Invitation to Bid, Bid Data Sheet, General Conditions of Contract, Special Conditions of Contract, Schedule of Requirements, and Specifications are not part of the text of the final document, although they contain instructions that the Procuring Entity should strictly follow.
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- d. The cover should be modified as required to identify the Bidding Documents as to the Procurement Project, Project Identification Number, and Procuring Entity, in addition to the date of issue.
- e. Modifications for specific Procurement Project details should be provided in the Special Conditions of Contract as amendments to the Conditions of Contract. For easy completion, whenever reference has to be made to specific clauses in the Bid Data Sheet or Special Conditions of Contract, these terms shall be printed in bold typeface on Sections I (Instructions to Bidders) and III (General Conditions of Contract), respectively.
- f. For guidelines on the use of Bidding Forms and the procurement of Foreign-Assisted Projects, these will be covered by a separate issuance of the Government Procurement Policy Board.

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Glossary of Acronyms, Terms, and Abbreviations

ABC – Approved Budget for the Contract.

BAC – Bids and Awards Committee.

Bid – A signed offer or proposal to undertake a contract submitted by a bidder in response to and in consonance with the requirements of the bidding documents. Also referred to as *Proposal* and *Tender*. (2016 revised IRR, Section 5[c])

Bidder – Refers to a contractor, manufacturer, supplier, distributor and/or consultant who submits a bid in response to the requirements of the Bidding Documents. (2016 revised IRR, Section 5[d])

Bidding Documents – The documents issued by the Procuring Entity as the bases for bids, furnishing all information necessary for a prospective bidder to prepare a bid for the Goods, Infrastructure Projects, and/or Consulting Services required by the Procuring Entity. (2016 revised IRR, Section 5[e])

BIR – Bureau of Internal Revenue.

BSP – Bangko Sentral ng Pilipinas.

Consulting Services – Refer to services for Infrastructure Projects and other types of projects or activities of the GOP requiring adequate external technical and professional expertise that are beyond the capability and/or capacity of the GOP to undertake such as, but not limited to: (i) advisory and review services; (ii) pre-investment or feasibility studies; (iii) design; (iv) construction supervision; (v) management and related services; and (vi) other technical services or special studies. (2016 revised IRR, Section 5[i])

CDA - Cooperative Development Authority.

Contract – Refers to the agreement entered into between the Procuring Entity and the Supplier or Manufacturer or Distributor or Service Provider for procurement of Goods and Services; Contractor for Procurement of Infrastructure Projects; or Consultant or Consulting Firm for Procurement of Consulting Services; as the case may be, as recorded in the Contract Form signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

CIF – Cost Insurance and Freight.

CIP – Carriage and Insurance Paid.

CPI – Consumer Price Index.

DDP – Refers to the quoted price of the Goods, which means “delivered duty paid.”

DTI – Department of Trade and Industry.

EXW – Ex works.

FCA – “Free Carrier” shipping point.

FOB – “Free on Board” shipping point.

Foreign-funded Procurement or Foreign-Assisted Project– Refers to procurement whose funding source is from a foreign government, foreign or international financing institution as specified in the Treaty or International or Executive Agreement. (2016 revised IRR, Section 5[b]).

Framework Agreement – Refers to a written agreement between a procuring entity and a supplier or service provider that identifies the terms and conditions, under which specific purchases, otherwise known as “Call-Offs,” are made for the duration of the agreement. It is in the nature of an option contract between the procuring entity and the bidder(s) granting the procuring entity the option to either place an order for any of the goods or services identified in the Framework Agreement List or not buy at all, within a minimum period of one (1) year to a maximum period of three (3) years. (GPPB Resolution No. 27-2019)

GFI – Government Financial Institution.

GOCC – Government-owned and/or –controlled corporation.

Goods – Refer to all items, supplies, materials and general support services, except Consulting Services and Infrastructure Projects, which may be needed in the transaction of public businesses or in the pursuit of any government undertaking, project or activity, whether in the nature of equipment, furniture, stationery, materials for construction, or personal property of any kind, including non-personal or contractual services such as the repair and maintenance of equipment and furniture, as well as trucking, hauling, janitorial, security, and related or analogous services, as well as procurement of materials and supplies provided by the Procuring Entity for such services. The term “related” or “analogous services” shall include, but is not limited to, lease or purchase of office space, media advertisements, health maintenance services, and other services essential to the operation of the Procuring Entity. (2016 revised IRR, Section 5[r])

GOP – Government of the Philippines.

GPPB – Government Procurement Policy Board.

INCOTERMS – International Commercial Terms.

Infrastructure Projects – Include the construction, improvement, rehabilitation, demolition, repair, restoration or maintenance of roads and bridges, railways, airports, seaports, communication facilities, civil works components of information technology projects, irrigation, flood control and drainage, water supply, sanitation, sewerage and solid waste management systems, shore protection, energy/power and electrification facilities, national

buildings, school buildings, hospital buildings, and other related construction projects of the government. Also referred to as *civil works or works*. (2016 revised IRR, Section 5[u])

LGUs – Local Government Units.

NFCC – Net Financial Contracting Capacity.

NGA – National Government Agency.

PhilGEPS - Philippine Government Electronic Procurement System.

Procurement Project – refers to a specific or identified procurement covering goods, infrastructure project or consulting services. A Procurement Project shall be described, detailed, and scheduled in the Project Procurement Management Plan prepared by the agency which shall be consolidated in the procuring entity's Annual Procurement Plan. (GPPB Circular No. 06-2019 dated 17 July 2019)

PSA – Philippine Statistics Authority.

SEC – Securities and Exchange Commission.

SLCC – Single Largest Completed Contract.

Supplier – refers to a citizen, or any corporate body or commercial company duly organized and registered under the laws where it is established, habitually established in business and engaged in the manufacture or sale of the merchandise or performance of the general services covered by his bid. (Item 3.8 of GPPB Resolution No. 13-2019, dated 23 May 2019). Supplier as used in these Bidding Documents may likewise refer to a distributor, manufacturer, contractor, or consultant.

UN – United Nations.

Section I. Invitation to Bid

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**INVITATION TO BID FOR THE PROCUREMENT OF SERVICES FOR THE
NATIONWIDE 2025 HARMONIZED CLIENT SATISFACTION
MEASUREMENT OF UCPB SAVINGS BANK, INC.**

1. The UCPB Savings Bank, Inc. (UCPBS) through the Approved Corporate Budget (ABC) of 2025 intends to apply the sum of TWO MILLION FIVE HUNDRED THOUSAND PESOS ONLY (Php 2,500,000.00) to payments under the contract for procurement of services for the Nationwide 2025 Harmonized Client Satisfaction Measurement of UCPBS, with a project identification number *ITB-CPCD-HCSM-001-25-06-2025*. Bids received in excess of the ABC shall be automatically rejected at bid opening.
2. The UCPBS now invites bids for the above Procurement Project. Delivery of the Goods is required by August 01, 2025, to July 31, 2026. Bidders should have completed, within *3 Years* from the date of submission and receipt of bids, a contract similar to the Project. The description of an eligible bidder is contained in the Bidding Documents, particularly in Section II (Instructions to Bidders).
3. Bidding will be conducted through open competitive bidding procedures using a non-discretionary "*pass/fail*" criterion as specified in the 2016 revised Implementing Rules and Regulations (IRR) of Republic Act (RA) No. 9184.

Bidding is restricted to Filipino citizens/sole proprietorships, partnerships, or organizations with at least sixty percent (60%) interest or outstanding capital stock belonging to citizens of the Philippines, and to citizens or organizations of a country the laws or regulations of which grant similar rights or privileges to Filipino citizens, pursuant to RA No. 5183.

4. Prospective Bidders may obtain further information from UCPBS and inspect the Bidding Documents at the address given below during office hours from 8:00 am to 4:00 pm.
5. A complete set of Bidding Documents may be acquired by interested Bidders on *June 30, 2025 until July 21, 2025* from the given address and website(s) below and upon payment of the applicable fee for the Bidding Documents, pursuant to the latest Guidelines issued by the GPPB, in the amount of *Php5,000.00*.

Instructions to bidders on payment of bid documents:

- a. The payment for the Bid Documents shall be limited to Cash or a Manager's/ Cashier's Check payable to UCPB Savings. Personal checks shall not be accepted.
- b. The Bidder is required to enclose the cover page of this Invitation to Bid (ITB) in order to properly determine which bid document, the Bidder is paying for.
- c. It may also be downloaded from the website of the Philippine Government Electronic Procurement System (PhilGEPS) and the website of the Procuring Entity, provided that the Bidders shall pay the applicable fee for the Bidding Documents not later than the submission of their bids.



6. The UCPBS will hold a Pre-Bid Conference¹ on *July 08, 2025* through video conferencing, which shall be open to prospective bidders.
7. ~~Bids must be duly received~~ by the BAC Secretariat ~~through manual submission at the~~ office address indicated below ~~on July 22, 2025 at 11:30 am~~. Late bids shall not be accepted.
8. All Bids must be accompanied by a bid security in any of the acceptable forms and in the amount stated in ITB Clause 14.
9. Bid opening shall be on *July 22, 2025 at 1:30pm* at the given address below. Bids will be opened in the presence of the bidders' representatives who choose to attend the activity.
10. The UCPBS 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 Sections 35.6 and 41 of the 2016 revised IRR of RA No. 9184, without thereby incurring any liability to the affected bidder or bidders.
11. **Governing Legal Framework** This procurement shall be governed by the pertinent provisions of both Republic Act (RA) No. 9184 and its 2016 revised Implementing Rules and Regulations (IRR) , and the new RA No. 12009, otherwise known as the "New Government Procurement Act," and its 2025 IRR.

This is in recognition of the ongoing three-year transition period and the current availability of bidding document templates from the Government Procurement Policy Board (GPPB), which are based on RA 9184. Bidders are advised that any ambiguity between the two legal frameworks will be resolved by adhering to the principles and mandatory provisions of RA No. 12009.

12. For further information, please refer to:

Christopher L. Suntay

BAC Secretariat

UCPB Savings, Inc.

7th Floor Robinsons Cybergate Magnolia

Aurora Blvd corner. Doña Hemedya St., New Manila, Quezon City

Email Address: bacsecretariat@ucpbsavings.com

13. You may visit the following websites:
For downloading of Bidding Documents: www.ucpbsavings.com

[Date of Issue]



Dante R. Cortez
BAC Chairperson

¹ May be deleted in case the ABC is less than One Million Pesos (PhP1,000,000) where the Procuring Entity may not hold a Pre-Bid Conference.

Section II. Instructions to Bidders

[Handwritten signature]

1. Scope of Bid

The Procuring Entity, UCPBS, wishes to receive Bids for the Procurement of services for the **NATIONWIDE 2025 HARMONIZED CLIENT SATISFACTION MEASUREMENT OF UCPB SAVINGS BANK**, with identification number ITB-CPCD-HCSM-001-25-06-2025.

The Procurement Project (referred to herein as "Project") is composed of one item, the details of which are described in Section VII (Technical Specifications).

2. Funding Information

2.1. The GOP through the source of funding as indicated below for **2025** in the amount of **TWO MILLION FIVE HUNDRED THOUSAND PESOS ONLY (Php 2,500,000.00)**.

2.2. The source of funding is GOCC and GFIs, the proposed Corporate Operating Budget.

3. Bidding Requirements

The Bidding for the Project shall be governed by all the provisions of RA No. 9184 and its 2016 revised IRR, including its Generic Procurement Manuals and associated policies, rules, and regulations as the primary source thereof, while the herein clauses shall serve as the secondary source thereof.

Any amendments made to the IRR and other GPPB issuances shall be applicable only to the ongoing posting, advertisement, or **IB** by the BAC through the issuance of a supplemental or bid bulletin.

The Bidder, by the act of submitting its Bid, shall be deemed to have verified and accepted the general requirements of this Project, including other factors that may affect the cost, duration, and execution or implementation of the contract, project, or work and examine all instructions, forms, terms, and project requirements in the Bidding Documents.

4. Corrupt, Fraudulent, Collusive, and Coercive Practices

The Procuring Entity, as well as the Bidders and Suppliers, shall observe the highest standard of ethics during the procurement and execution of the contract. They or through an agent shall not engage in corrupt, fraudulent, collusive, coercive, and obstructive practices defined under Annex "I" of the 2016 revised IRR of RA No. 9184 or other integrity violations in competing for the Project.

5. Eligible Bidders

- 5.1. Only Bids of Bidders found to be legally, technically, and financially capable will be evaluated.
- 5.2. Foreign ownership exceeding those allowed under the rules may participate pursuant to:
 - i. Citizens, corporations, or associations of a country, included in the list issued by the GPPB, the laws or regulations of which grant reciprocal rights or privileges to citizens, corporations, or associations of the Philippines;
 - a. Foreign ownership limited to those allowed under the rules may participate in this Project.
- 5.3. Pursuant to Section 23.4.1.3 of the 2016 revised IRR of RA No.9184, the Bidder shall have an SLCC that is at least one (1) contract similar to the Project the value of which, adjusted to current prices using the PSA's CPI, must be at least equivalent to:
 - a. For the procurement of Expendable Supplies: The Bidder must have completed a single contract that is similar to this Project, equivalent to at least twenty-five percent (25%) of the ABC.
 - b. For procurement where the Procuring Entity has determined, after the conduct of market research, that imposition will likely result in failure of bidding or monopoly that will defeat the purpose of public bidding: the Bidder should comply with the following requirements:
 - i. Completed at least two (2) similar contracts, the aggregate amount of which should be equivalent to at least twenty-five percent (25%) of the ABC for this Project; and
- 5.4. The Bidders shall comply with the eligibility criteria under Section 23.4.1 of the 2016 IRR of RA No. 9184.

6. Origin of Goods

There is no restriction on the origin of goods other than those prohibited by a decision of the UN Security Council taken under Chapter VII of the Charter of the UN, subject to Domestic Preference requirements under ITB Clause 18.

7. Subcontracts

The Procuring Entity has prescribed that subcontracting is not allowed.

8. Pre-Bid Conference

The Procuring Entity will hold a pre-bid conference for this Project on the specified date and time through videoconferencing as indicated in paragraph 6 of the IB.

9. Clarification and Amendment of Bidding Documents

Prospective bidders may request clarification on and/or interpretation of any part of the Bidding Documents. Such requests must be in writing and received by the Procuring Entity, either at its given address or through electronic mail indicated in the IB, at least ten (10) calendar days before the deadline set for the submission and receipt of Bids.

10. Documents Comprising the Bid: Eligibility and Technical Components

- 10.1. The first envelope shall contain the eligibility and technical documents of the Bid as specified in **Section VIII (Checklist of Technical and Financial Documents)**.
- 10.2. The Bidder's SLCC as indicated in ITB Clause 5.3 should have been completed within three (3) years prior to the deadline for the submission and receipt of bids.
- 10.3. If the eligibility requirements or statements, the bids, and all other documents for submission to the BAC are in a foreign language other than English, they must be accompanied by a translation in English, which 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. Similar to the required authentication above, for Contracting Parties to the Apostille Convention, only the translated documents shall be authenticated through an apostille pursuant to GPPB Resolution No. 13-2019 dated 23 May 2019. The English translation shall govern, for purposes of interpretation of the bid.

11. Documents Comprising the Bid: Financial Component

- 11.1. The second bid envelope shall contain the financial documents for the Bid as specified in **Section VIII (Checklist of Technical and Financial Documents)**.
- 11.2. If the Bidder claims preference as a Domestic Bidder or Domestic Entity, a certification issued by DTI shall be provided by the Bidder in accordance with Section 43.1.3 of the 2016 revised IRR of RA No. 9184.
- 11.3. Any bid exceeding the ABC indicated in paragraph 1 of the IB shall not be accepted.
- 11.4. For Foreign-funded Procurement, a ceiling may be applied to bid prices provided the conditions are met under Section 31.2 of the 2016 revised IRR of RA No. 9184.

12. Bid Prices

12.1. Prices indicated on the Price Schedule shall be entered separately in the following manner:

- a. For Goods offered from within the Procuring Entity's country:
 - i. The price of the Goods quoted EXW (ex-works, ex-factory, ex-warehouse, ex-showroom, or off-the-shelf, as applicable);
 - ii. The cost of all customs duties and sales and other taxes already paid or payable;
 - iii. The cost of transportation, insurance, and other costs incidental to delivery of the Goods to their final destination; and
 - iv. The price of other (incidental) services, if any, listed in the **BDS**.
- i. The price of other (incidental) services, if any, as listed in the **BDS**.

13. Bid and Payment Currencies

13.1. For Goods that the Bidder will supply from outside the Philippines, the bid prices may be quoted in the local currency or tradeable currency accepted by the BSP at the discretion of the Bidder. However, for purposes of bid evaluation, Bids denominated in foreign currencies shall be converted to Philippine currency based on the exchange rate as published in the BSP reference rate bulletin on the day of the bid opening.

13.2. Payment of the contract price shall be made in:

- a. Philippine Peso.

14. Bid Security

14.1. The Bidder shall submit a Bid Securing Declaration² or any form of Bid Security in the amount indicated in the **BDS**, which shall be not less than the percentage of the ABC in accordance with the schedule in the **BDS**.

14.2. The Bid and bid security shall be valid for 120 days from the date of bid opening. Any Bid not accompanied by an acceptable bid security shall be rejected by the Procuring Entity as non-responsive.

² In the case of Framework Agreement, the undertaking shall refer to entering into contract with the Procuring Entity and furnishing of the performance security or the performance securing declaration within ten (10) calendar days from receipt of Notice to Execute Framework Agreement.

15. Sealing and Marking of Bids

Each Bidder shall submit one copy of the first and second components of its Bid.

The Procuring Entity may request additional hard copies and/or electronic copies of the Bid. However, failure of the Bidders to comply with the said request shall not be a ground for disqualification.

If the Procuring Entity allows the submission of bids through online submission or any other electronic means, the Bidder shall submit an electronic copy of its Bid, which must be digitally signed. An electronic copy that cannot be opened or is corrupted shall be considered non-responsive and, thus, automatically disqualified.

16. Deadline for Submission of Bids

16.1. The Bidders shall submit on the specified date and time and either at its physical address.

17. Opening and Preliminary Examination of Bids

17.1. The BAC shall open the Bids in public at the time, on the date, and at the place specified in paragraph 9 of the IB. The Bidders' representatives who are present shall sign a register evidencing their attendance. In case videoconferencing, webcasting, or other similar technologies will be used, the attendance of participants shall likewise be recorded by the BAC Secretariat.

In case the Bids cannot be opened as scheduled due to justifiable reasons, the rescheduling requirements under Section 29 of the 2016 revised IRR of RA No. 9184 shall prevail.

17.2. The preliminary examination of bids shall be governed by Section 30 of the 2016 revised IRR of RA No. 9184.

18. Domestic Preference

18.1. The Procuring Entity will grant a margin of preference for the purpose of comparison of Bids in accordance with Section 43.1.2 of the 2016 revised IRR of RA No. 9184.

19. Detailed Evaluation and Comparison of Bids

19.1. The Procuring Entity's BAC shall immediately conduct a detailed evaluation of all Bids rated "*passed*," using non-discretionary pass/fail criteria. The BAC shall consider the conditions in the evaluation of Bids under Section 32.2 of the 2016 revised IRR of RA No. 9184.

19.2. The descriptions of the lots or items shall be indicated in **Section VII (Technical Specifications)**, although the ABCs of these lots or items are indicated in the **BDS** for purposes of the NFCC computation pursuant to Section 23.4.2.6 of the

2016 revised IRR of RA No. 9184. The NFCC must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder.

19.3. The Project shall be awarded as follows:

Option 1 – One Project having several items that shall be awarded as one contract.

19.4. Except for bidders submitting a committed Line of Credit from a Universal or Commercial Bank in lieu of its NFCC computation, all Bids must include the NFCC computation pursuant to Section 23.4.1.4 of the 2016 revised IRR of RA No. 9184, which must be sufficient for the total of the ABCs for all the lots or items participated in by the prospective Bidder. For bidders submitting the committed Line of Credit, it must be at least equal to ten percent (10%) of the ABCs for all the lots or items participated in by the prospective Bidder.

20. Post-Qualification

20.1. Within a non-extendible period of five (5) calendar days from receipt by the Bidder of the notice from the BAC that it submitted the Lowest Calculated Bid, the Bidder shall submit its latest income and business tax returns filed and paid through the BIR Electronic Filing and Payment System (eFPS) and other appropriate licenses and permits required by law and stated in the BDS. Signing of the Contract.

21. Signing of the Contract

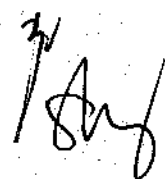
21.1. The documents required in Section 37.2 of the 2016 revised IRR of RA No. 9184 shall form part of the Contract. Additional Contract documents are indicated in the BDS.



Section III. Bid Data Sheet

Bid Data Sheet

ITB Clause													
5.3	For this purpose, contracts similar to the Project shall be: a. Procurement of services for the NATIONWIDE 2025 HARMONIZED CLIENT SATISFACTION MEASUREMENT OF UCPB SAVINGS BANK. b. The bidder must have completed within July 01, 2025, to June 30, 2026 prior to the deadline for the submission and receipt of bids.												
7.1	Subcontracting is not allowed.												
12	The price of the Goods shall be quoted DDP at UCPB Savings, Inc. , 7th Floor Robinsons Cybergate Magnolia, Aurora Blvd cor. Doña Hemedy St. New Manila Quezon City or the applicable International Commercial Terms (INCOTERMS) for this Project.												
14.1	The bid security shall be in the form of a Bid Securing Declaration, or any of the following forms and amounts: a. The amount of not less than Forty-four thousand pesos (Php 50,000.00) (2%) of ABC if bid security is in cash, cashier's/manager's check, bank draft/guarantee, or irrevocable letter of credit; or b. The amount not less than One hundred ten thousand pesos (Php 125,000.00) (5%) of ABC if bid security is in Surety Bond.												
19.3	<table><tr><th>ACTIVITIES</th><th>DELIVERABLES</th><th>TIMELINE</th></tr><tr><td>Inception Meeting</td><td>Inception Report</td><td>4 weeks after the signing of the contract.</td></tr><tr><td>Data processing and analysis for the HCSM on all transactions and progress reports of the Bank's HCSM.</td><td>Progress Report on the Bank's HCSM activities.</td><td>4 weeks after the completion of data collection.</td></tr><tr><td>Submission of the final report and pertinent annexes.</td><td>Final report and annexes required.</td><td>4 weeks after the submission of the final report.</td></tr></table> <i>*calendar days</i>	ACTIVITIES	DELIVERABLES	TIMELINE	Inception Meeting	Inception Report	4 weeks after the signing of the contract.	Data processing and analysis for the HCSM on all transactions and progress reports of the Bank's HCSM.	Progress Report on the Bank's HCSM activities.	4 weeks after the completion of data collection.	Submission of the final report and pertinent annexes.	Final report and annexes required.	4 weeks after the submission of the final report.
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Section IV. General Conditions of Contract

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1. Scope of Contract

This Contract shall include all such items, although not specifically mentioned, that can be reasonably inferred as being required for its completion as if such items were expressly mentioned herein. All the provisions of RA No. 9184 and its 2016 revised IRR, including the Generic Procurement Manual and associated issuances, constitute the primary source for the terms and conditions of the Contract, and thus, are applicable in contract implementation. Herein, clauses shall serve as the secondary source for the terms and conditions of the Contract.

This is without prejudice to Sections 74.1 and 74.2 of the 2016 revised IRR of RA No. 9184, allowing the GPPB to amend the IRR, which shall be applied to all procurement activities, the advertisement, posting, or invitations that were issued after the effectivity of the said amendment.

Additional requirements for the completion of this Contract shall be provided in the **Special Conditions of Contract (SCC)**.

2. Advance Payment and Terms of Payment

- 2.1. Advance payment of the contract amount is provided under Annex "D" of the revised 2016 IRR of RA No. 9184.
- 2.2. The Procuring Entity is allowed to determine the terms of payment on the partial or staggered delivery of the Goods procured, provided such partial payment shall correspond to the value of the goods delivered and accepted in accordance with prevailing accounting and auditing rules and regulations. The terms of payment are indicated in the SCC.

3. Performance Security

Within ten (10) calendar days from receipt of the Notice of Award by the Bidder from the Procuring Entity but in no case later than the signing of the Contract by both parties, the successful Bidder shall furnish the performance security in any of the forms prescribed in Section 39 of the 2016 revised IRR of RA No. 9184

4. Inspection and Tests

The Procuring Entity or its representative shall have the right to inspect and/or test the Goods to confirm their conformity to the Project *[Include if Framework Agreement will be used:]* or Framework Agreement specifications at no extra cost to the Procuring Entity in accordance with the Generic Procurement Manual. In addition to tests in the **SCC, Section VII (Technical Specifications)** shall specify what inspections and/or tests the Procuring Entity requires, and where they are to be conducted. The Procuring Entity shall notify the Supplier in writing, in a timely manner, of the identity of any representatives retained for these purposes.

All reasonable facilities and assistance for the inspection and testing of Goods, including access to drawings and production data, shall be provided by the Supplier to the authorized inspectors at no charge to the Procuring Entity.

5. Warranty

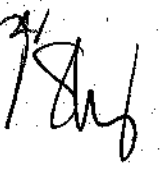
- 5.1 In order to assure that manufacturing defects shall be corrected by the Supplier, a warranty shall be required from the Supplier as provided under Section 62.1 of the 2016 revised IRR of RA No. 9184.
- 5.2 The Procuring Entity shall promptly notify the Supplier in writing of any claims arising under this warranty. Upon receipt of such notice, the Supplier shall, repair or replace the defective Goods or parts thereof without cost to the Procuring Entity, pursuant to the Generic Procurement Manual.

6. Liability of the Supplier

The Supplier's liability under this Contract shall be as provided by the laws of the Republic of the Philippines.

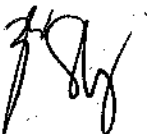
If the Supplier is a joint venture, all partners to the joint venture shall be jointly and severally liable to the Procuring Entity.

Section V. Special Conditions of Contract

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Special Conditions of Contract

GCC Clause	
1	Delivery and Documents – For purposes of the Contract, “EXW,” “FOB,” “FCA,” “CIF,” “CIP,” “DDP” and other trade terms used to describe the obligations of the parties shall have the meanings assigned to them by the current edition of INCOTERMS published by the International Chamber of Commerce, Paris. The Delivery terms of this Contract shall be as follows: “The delivery terms applicable to this Contract are delivered UCPBS Head Office. Risk and title will pass from the Supplier to the Procuring Entity upon receipt and final acceptance of the Goods at their final destination.” Delivery of the Goods shall be made by the Supplier in accordance with the terms specified in Section VI (Schedule of Requirements). For purposes of this Clause, the Procuring Entity’s Representatives at the Project Site are Christine Y. Vaquilar and Jay Martin N. Juarez. Incidental Services – The Supplier is required to provide all of the following services, including additional services, if any, specified in Section VI. Schedule of Requirements: a. performance or supervision on start-up of the services; b. furnishing of tools required analysis and interpretation of data; c. performance or supervision for the specified period coverage of the services required; and
	Intellectual Property Rights – The Supplier shall indemnify the Procuring Entity against all third-party claims of infringement of patent, trademark, or industrial design rights arising from the use of the Goods or any part thereof.
	Regular and Recurring Services –



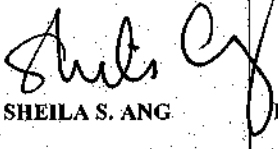
	“The contract for regular and recurring services shall be subject to a renewal whereby the performance evaluation of the service provider shall be conducted in accordance with Section VII. Technical specifications.”			
2.2	The terms of payment shall be as follows:			
	ACTIVITIES	DELIVERABLES	TIMELINE	PAYMENT
	Inception Meeting	Inception Report	4 weeks after the signing of the contract.	20%- Project Mobilization
	Data processing and analysis for the HCSM on all transactions and progress reports of the Bank's HCSM.	Progress Report on the Bank's HCSM activities.	4 weeks after the completion of data collection.	30%- Completion
	Submission of the final report and pertinent annexes.	Final report and annexes required.	4 weeks after the submission of the final report.	50%- Submission of Final Report and Presentation of Results

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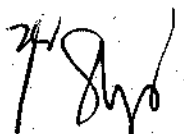
Section VI. Schedule of Requirements

The delivery schedule expressed as weeks/months stipulates hereafter a delivery date which is the date of delivery to the project site.

ACTIVITIES	DELIVERABLES	TIMELINE	PAYMENT
Inception Meeting	Inception Report	4 weeks after the signing of the contract.	20%- Project Mobilization
Data processing and analysis for the HCSM on all transactions and progress reports of the Bank's HCSM.	Progress Report on the Bank's HCSM activities.	4 weeks after the completion of data collection.	30%- Completion
Submission of the final report and pertinent annexes.	Final report and annexes required.	8 weeks after the submission of the final report.	50%- Submission of Final Report and Presentation of Results

<i>Expected delivery timeframe after receipt of a Call-Off.</i>	<i>Within [no. of days] calendar days upon issuance of the Call-off.</i>	
 SHEILA S. ANG	HEAD- CORPORATE PLANNING AND COMMUNICATIONS DIVISION	CORPORATE PLANNING AND COMMUNICATIONS DIVISION
<i>SIGNATURE OVER PRINTED NAME</i>	<i>POSITION</i>	<i>DEPARTMENT/DIVISION</i>

Section VII. Technical Specifications

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Technical Specifications

Item	Specification	Statement of Compliance
	REFER TO THE ATTACHED TERMS OF REFERENCE	<i>[Bidders must state here either "Comply" or "Not Comply" against each of the individual parameters of each Specification, stating the corresponding performance parameter of the equipment offered. Statements of "Comply" or "Not Comply" must be supported by evidence in a Bidder's Bid and cross-referenced to that evidence.]</i>



Section VIII. Checklist of Technical and Financial Documents

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Checklist of Technical and Financial Documents

I. TECHNICAL COMPONENT ENVELOPE

Class "A" Documents

Legal Documents

- ☐ (a) Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages) **in accordance with Section 8.5.2 of the IRR;**

Technical Documents

- ☐ (b) Statement of the prospective bidder of all its ongoing 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; **and**
- ☐ (c) Statement of the bidder's Single Largest Completed Contract (SLCC) similar to the contract to be bid, except under conditions provided for in Sections 23.4.1.3 and 23.4.2.4 of the 2016 revised IRR of RA No. 9184, within the relevant period as provided in the Bidding Documents; **and**
- ☐ (d) Original copy of Bid Security. If in the form of a Surety Bond, submit also a certification issued by the Insurance Commission **or an** Original copy of a Notarized Bid Securing Declaration; **and**
- ☐ (e) Conformity with the Technical Specifications, which may include production/delivery schedule, manpower requirements, and/or after-sales/parts, if applicable; **and**
- ☐ (f) Original duly signed Omnibus Sworn Statement (OSS) **and** if applicable, Original Notarized Secretary's Certificate in case of a corporation, partnership, or cooperative; or Original 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.

Financial Documents

- ☐ (g) The prospective bidder's computation of Net Financial Contracting Capacity (NFCC) **or A** committed Line of Credit from a Universal or Commercial Bank in lieu of its NFCC computation.

Class "B" Documents

- ☐ (h) If applicable, a duly signed joint venture agreement (JVA) in case the joint venture is already in existence **or** duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful.

II. FINANCIAL COMPONENT ENVELOPE

- ☐ (i) Original of duly signed and accomplished Financial Bid Form; **and**
- ☐ (j) Original of duly signed and accomplished Price Schedule(s).

Other documentary requirements under RA No. 9184 (as applicable)

- ☐ (k) *[For foreign bidders claiming by reason of their country's extension of reciprocal rights to Filipinos]* Certification from the relevant government office of their country stating that Filipinos are allowed to participate in

government procurement activities for the same item or product.

- ☐ (l) Certification from the DTI if the Bidder claims preference as a Domestic Bidder or Domestic Entity.

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Section IX. Terms of Reference

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TERM OF REFERENCE (TOR)

PROCUREMENT OF SERVICES FOR THE NATIONWIDE 2025 HARMONIZED CLIENT SATISFACTION MEASUREMENT OF UCPB SAVINGS BANK

I. Background

Corollary to its commitment as a dedicated Government-Owned and Controlled Corporation (GOCC) aligned with the objectives of the Anti-Red Tape Authority (ARTA), UCPB Savings Bank, Inc. (UCPBS) has participated in the Harmonized Client Satisfaction Measurement (HCSM) for three consecutive years.

In 2023, the HCSM was focused on external customers, which resulted in an overall rating of 99.61%. In 2024, the scope was expanded to include both internal and external clients, resulting in an impressive overall satisfaction rating of 99.80%.

In line with UCPBS' continuous pursuit of service excellence, the 2025 HCSM initiative seeks to elevate the quality of client engagement further by integrating two additional service quality dimensions:

Additional Service Quality Dimensions	Definition
1. Inclusivity and Accessibility	Looks at whether customers with diverse needs (e.g., elderly, persons with disabilities, low digital access) feel supported and included in service delivery.
2. Consistency of Experience Across Branches	Useful for multi-branch banks — identifies variation in service quality and standard compliance across locations, which can impact brand perception.

II. Objective

UCPB Savings, Inc. (UCPBS) aims to engage the services of a Third-Party Service Provider that would meet all the requirements stated on the JMC pertinent to the conduct of the 2025 HCSM of UCPBS.

The project's main objective is to provide tangible and verifiable data on how UCPBS delivers customer services.

More specifically, the project aims to:

1. Measure the overall client satisfaction with UCPBS
2. Measure the overall client satisfaction with UCPBS specific to the services availed.
3. Measure the client satisfaction with UCPBS on eight (8) Service Dimensions as follows:
 - a. Responsiveness;
 - b. Reliability;

- c. Access and Facilities;
 - d. Communication;
 - e. Costs;
 - f. Integrity;
 - g. Assurance;
 - h. Outcome;
 - i. Inclusivity and Accessibility; and
 - j. Consistency of Experience Across Branches
4. Measure client satisfaction with UCPBS on 10 Service Dimensions on services availed; and
 5. Ascertain awareness and usefulness of the Citizen's Charter.

III. Scope of Work

1. The Third-Party Service Provider shall undertake within the agreed schedule all relevant and necessary research activities, including but not limited to conducting processing, validation, evaluation, and interpretation of results, and preparation of final reports. The timely submission and presentation of the project to the Customer Management Department, the Management Committee, and the Bank representatives, and the preparation of all other related activities to fulfill the requirements of the project shall be included.
2. The Third-Party Service Provider shall submit within the agreed schedule the final report in hard and electronic copies. The Final Report shall:
 - a. Present the results in accordance with the prescriptions set forth in ARTA's Memorandum Circular No. 2022-05, i.e., Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement.
 - b. Contain all relevant mathematical formulas and other related scientific and technical procedures applied in the completion of the project.
 - c. A summary describing the quality control procedures performed in the conduct of the survey shall also be submitted.
3. As required by UCPBS and concerned regulators, the Third-Party Service Provider shall be at all times ready to provide related information/data needed by UCPBS.

IV. Survey Methodology

1. Target Respondents

The survey should engage UCPBS clients with completed external transactions. Clients who completed multiple transactions may complete an HCSM Questionnaire for each availed service.

Transactions are considered complete when the final step of the service availed of as per the UCPB's Citizens' Charter is undertaken.

These are the list of banking services. Not all services may be applicable across all UCPBS branches.

LIST OF
TRANSACTIONS

Division/ Department	Count	Type	Code	Transactions
Branch Banking Division	1	External	BBPS	Acceptance of Deposit
	2	External	BBPS	Account Opening
	3	External	BBPS	Application for Bank Deposit Certification (BDC)
	4	External	BBPS	Availment of Loan Against Holdout (back-to-back loans)
	5	External	BBPS	Check Encashment - Current Account
	6	External	BBPS	Checkbook Issuance
	7	External	BBPS	Checkbook Requisition
	8	External	BBPS	Claim of Remittance Proceeds (For Existing Clients Only)
	9	External	BBPS	CTD Pre-Termination/Termination
	10	External	BBPS	CTD Roll-Over/Renewal
	11	External	BBPS	Deposit Account Closure
	12	External	BBPS	Domestic Bills Purchase (BP) Initiation/ Availment
	13	External	BBPS	Fund Transfer
	14	External	BBPS	Payment of Salary Loan
	15	External	BBPS	PESONet Inward Service
	16	External	BBPS	PESONet Outward Service
	17	External	BBPS	Processing of ATM Card Requested by Client
	18	External	BBPS	Processing of Incoming Remittance- RTGS
	19	External	BBPS	Processing of PHILHEALTH Payment
	20	External	BBPS	Purchase of Manager's Check (MC)
	21	External	BBPS	Reactivation/ Closure of Dormant Deposit Account
	22	External	BBPS	Release of Captured Card
	23	External	BBPS	Request for ATM PIN Change/ Forced PIN Change
	24	External	BBPS	Request for Bank Certification/Statement of Account for Salary Loan

	25	External	BBPS	Request for Statement of Account (SOA) by Client
	26	External	BBPS	Request for Stop Payment Order
	27	External	BBPS	Retrieval of Captured ATM Cards
	28	External	BBPS	Salary Loan – Application to Loan Release (MC or Credit to account)
	29	External	BBPS	Withdrawal- Savings Account
Lending Divisions (Commercial and Retail)	30	External	LPS	Auto Loan Application
	31	External	LPS	Cash Loan Application
	32	External	LPS	Commercial Loan Application
	33	External	LPS	Execution and Issuance of Mortgage Redemption Certificate
	34	External	LPS	Issuance of Certificate of Full Payment/Statement of Account
	35	External	LPS	Issuance of Negative Certification
	36	External	LPS	Real Estate Loan Application
	37	External	LPS	Release of Collaterals as a Result of Full Payment
	38	External	LPS	Release of Collaterals via Loan Take-out (Full Payment) By Other Institutions
	39	External	LPS	Settlement of Loan Obligations by Delinquent Borrowers
Treasury Division	40	External	TIBS	Acceptance of Certificate of Time Deposit (CTD) Placement
	41	External	TIBS	Account Opening
	42	External	TIBS	CTD Pre-termination/ Termination
	43	External	TIBS	CTD Roll-Over/ Renewal
Special Asset and Management	44	External	SAMS	Sale of REAL and other properties acquired
Human Resources & General Services	45	External	HRDS	Employment Verification
Customer Assistance and Management Center	46	External	CAMS	Customer Feedback and Complaints
Credit Management Division	1	Internal	CMS	Conduct of Credit Investigation (Initial Credit Investigation)
	2	Internal	CMS	Conduct of Credit Investigation (Field Credit Investigation)
	3	Internal	CMS	Custodianship and Safekeeping of Documents
	4	Internal	CMS	Documentation and Review of Documents

	5	Internal	CMS	Local Title Verification
	6	Internal	CMS	Request for Release of Collateral (Corporate/Commercial)
	7	Internal	CMS	Request for Release of Collateral (Retail)
	8	Internal	CMS	Securing Certified Title Electronic Copy
	9	Internal	CMS	Vehicle Appraisal
Operations Division	10	Internal	OPS	Booking of Loan Transactions
Treasury Division	11	Internal	TIBS	Establishment and Renewal of Money Market
	12	Internal	TIBS	Funding Peso
Human Resources & General Services	13	Internal	HRGS	Availing of Violence against Women and Children Leave
	14	Internal	HRGS	Availing of Magna Carta Leave
	15	Internal	HRGS	Availing of Paternity Leave
	16			Availing of Maternity Leave
	17	Internal	HRGS	Availing of Solo Parent Leave
	18	Internal	HRGS	Evaluation of Proposal for Regular Hiring
	19	Internal	HRGS	Head Office FFE Asset Disposal
	20	Internal	HRGS	Procurement and Bidding Process
	21	Internal	HRGS	Replacement of Lost, Old or Damaged Employee ID
	22	Internal	HRGS	Request for COE
	23	Internal	HRGS	Request for Service Vehicle
Finance Accounting and Tax Management	24	Internal	FATMS	Processing of Request for Payment- Expenses and Claims/ Reimbursement
Legal Services	25	Internal	LSS	Legal Chopping of Documents
	26	Internal	LSS	Review of Contracts
Branch Banking Division	27	Internal	BBPS	Branch FFE Asset Disposal
Information Technology Division	28	Internal	ITS	Access Request and Support Services

2. Frequency and Period of the Survey

The HCSM shall be conducted after each completed transaction. It shall be administered between January to December 2025.

3. Number of Respondents

The minimum number of responses per service shall be determined based on the calculator provided by ARTA through the link below. HCSM shall still be conducted even if the minimum has been reached.

- https://docs.google.com/spreadsheets/d/1_h5Fv8ByZq4oX5Wh_iV2S6yPUsxbe6_B/edit?usp=sharing&ouid=100607176689593668905&rtpof=true&sd=true

4. Sampling of Respondents

In coordination with UCPBS, Branches, branch lites, lending offices, and Head Office (Divisions, Departments or Units) shall represent the total sample size required based on the link provided by ARTA.

Every respondent who completes a banking transaction qualifies as a respondent for the survey on the service/s they have availed.

List of Branches, Branch Lites, and Lending Offices:

	Branch	Address
	LUZON 1	
1	Alfonso	Mabini St. Corner Libertad St. Poblacion II, Alfonso Cavite
2	Banaue (formerly Sta. Cruz)	Ground Floor PPSTA Dormitory Building, 245 Banaue St., Sto. Domingo, Quezon City
3	Batac	MC Building Washington Street Barangay Ablan Batac, Ilocos Norte
4	Kalayaan	106 Neptune Street, Kalayaan Avenue Corner Makati Avenue, Makati City
5	La Trinidad	JC 159 Central Pico, La Trinidad, Benguet
6	Lingayen	Corner Avenida Rizal & Artacho West Streets Lingayen Pangasinan

7	Mabalacat	Kimaesha Bldg., Dau Mc-Arthur Highway, Mabalacat City
8	Malolos	Paseo Del Congreso, Catmon, Malolos, Bulacan
9	Morong	600 Tomas Claudio Street, San Pedro Morong, Rizal
10	Rizal Avenue	Unit 201-203 Tan Han Chi Place 1558 Rizal Ave. corner Mayhaligue St. Sta. Cruz, Manila
11	San Jose Del Monte	Dalisay Bldg., Halili Ave., Tungkong Mangga, San Jose Del Monte, Bulacan
12	Sta. Ignacia	Altandex Building beside Alta Gas Station Romulo Highway, Poblacion East, Sta. Ignacia, Tarlac
13	Tanay	F.T Catapusan St., Plaza Aldea, Tanay, Rizal
14	Tanza	007 A. Soriano Highway, Daang Amaya 1, Tanza, Cavite
15	Bacnotan Branch Lite (formerly Pampanga LO)	267 Maharlika Highway Poblacion, Bacnotan, La Union
16	Ilagan Branch Lite (formerly Ilagan LO)	Ground Floor, Hipolito Building, Maharlika Highway, Calamagui 2nd City of Ilagan, Isabela 3300
17	Orion Branch Lite (formerly Balanga LO)	Stall No. 31 National Road, Brgy. Arellano, Orion, Bataan
18	Rizal Nueva Ecija (formerly Cabanatuan LO)	Quezon St., Poblacion Centro, Rizal, Nueva Ecija
LUZON 2		
1	Alabang	Common Goal Tower Finance St. corner Industry St. Madrigal Business Park Alabang, Muntinlupa City
2	Alaminos	M. H. Del Pilar Street, Poblacion, Alaminos, Laguna

3	Atimonan	Quezon St. corner C.O. Reyes St. Brgy. Zone II, Atimonan Quezon
4	Calauag	Cantre St. Corner Bonifacio St. Brgy. 3 Calauag, Quezon
5	Caramoan	41 Real Street, Tawog Caramoan Camarines Sur
6	Goa	Rizal Street Cor. Panday St., Brgy. Poblacion, GOA, Camarines Sur
7	Libmanan	Bichara Arcade, T. Dilanco Street, Libod#1, Libmanan, Camarines Sur
8	Lucban	Rizal Avenue corner San Luis Street, Brgy. 8, Lucban, Quezon
9	Nagcarlan	Golden Park Rentals and Wellness Bldg., Rizal Ave. Poblacion 2, Nagcarlan, Laguna
10	Pili	National Highway, Brgy. Old San Roque, Pili, Camarines Sur
11	Puerto Princesa	AICON Plaza, National Highway, Bgy. San Pedro, Puerto Princesa City, Palawan
12	Sablayan	420 P. Urieta St., Brgy. Buenavista, Sablayan, Occidental Mindoro
13	San Jose-Batangas (formerly San Mateo)	Makalintal Ave. corner Dr. Ona St., San Jose, Batangas
14	Sta. Rosa	UCPB Building National Hi-Way Brgy. Balibago, Sta Rosa Laguna
15	Tayabas	64 Quezon Avenue (Tayabas-Lucban Road) cor M. Ponce Street Brgy. San Diego Zone 1, City of Tayabas Quezon
16	Tiaong	Maharlika Highway corner San Antonio Road Poblacion 3, Tiaong, Quezon

17	Daraga Branch Lite (formerly Albay LO)	Daraga Town Center, Bañag, Daraga, Albay
18	Calapan Branch Lite (formerly Calapan LO)	Ground Floor Halcon Heights Building Dama de Noche St., Lumang Bayan, Calapan City, Oriental Mindoro
VISAYAS		
1	Bacolod	Ground Floor, San Antonio Park Square, Mandalangan Bacolod City, Negros Occidental
2	Borongan	E. Cinco Street Borongan City, Eastern Samar
3	Escalante	Stall D-1, Puregold Bldg. North Ave Balintawak, Escalante City, Negros Occidental
4	Iloilo	Angeles Arcade De Leon Street, Iloilo City
5	La Castellana	Feria corner Bonifacio Street, Brgy. Robles La Castellana, Negros Occidental
6	Naga Cebu	E. Sayson St., Central Poblacion Naga City, Cebu
7	Numancia	R.P.V. Building, National Highway Brgy. Joyao-joyao, Numancia, Aklan
8	Ormoc	G/F HSSC Building Real Street, Ormoc City
9	San Jose Antique	Ground Floor, LASP Building Gov. Fullion St. San Jose de Buenavista, Antique
10	Sogod	Osmeña Street, Brgy. Zone IV Sogod, Southern Leyte
11	Tuburan	Tabotabo Street, Poblacion Tuburan, Cebu
12	Gandara Branch Lite (formerly Calbayog LO)	Maharlika Highway, Brgy. Adela Heights, Gandara, Samar
13	Palo Branch Lite (formerly Tacloban LO)	Tacloban - Baybay Road, Brgy. Guindapunan, Palo, Leyte
MINDANAO		
1	Aloran	Jose Mutia Street, Brgy. Ospital Aloran, Misamis Occidental
2	Bulua	G/F Forever Books Building, Zone 6 Bulua, Cagayan De Oro City, Misamis Oriental
3	Cagayan de Oro	Capistrano-Cruz, Taal Streets, Brgy 7, Cagayan de Oro City, Misamis Oriental

4	Davao	MK Central Bldg. J.P. Laurel Ave. Bajada, Davao City
5	Dipolog	Quezon Avenue, Miputak, Dipolog City, Zamboanga Del Norte
6	Glan	182-C Enrique Yap Street, Poblacion Glan, Sarangani Province
7	Lamitan	Quezon Boulevard, Brgy. Malakas, Lamitan, Basilan
8	Sindangan (formerly Lapasan Branch)	Mabini Street, Brgy. Poblacion Sindangan, Zamboanga del Norte
9	Tagum	Consuelo Business Center Units 9-12 Pioneer Ave., Magugpo South Tagum City
10	Kabasalan Branch Lite (formerly Laguindingan LO)	Cainglet, Kabasalan, Zamboanga Sibugay
11	Prosperidad Branch Lite (formerly Sindangan LO)	Purok 3, Patin-Ay, Prosperidad, Agusan del Sur
12	Zamboanga	Jasmin Tower Bldg., corner Buenavista and Mayor Jaldon St., Zamboanga City
13	Butuan	Door G, 2/F Oro Cam Building, J.C. Aquino Avenue corner M. Carlo Street, Silongan, Butuan City, Agusan Del Norte
14	Malaybalay	Unit 3 Saint Joseph Square Fortich St., Brgy. 3 Malaybalay City, Bukidnon

5. Data Gathering Method

For purposes of the conduct of UCPBS 2025 HCSM, various data-gathering methods shall be used to maximize response rates:

- a. On-site Conduct – done through a paper survey questionnaire and electronic platforms in providing questionnaires to the respondents. For PWDs and senior citizens who need assistance, the Public Assistance and Complaints Desk (PACD) officer or a designated officer shall help the respondents in answering the HCSM; and
- b. Remote Conduct – done through warm calls, electronic mail, the Bank's website, social media, QR code, or other similar modes.

6. Collection Mechanism

Results of the computer-aided questionnaire shall be in sync or uploaded to the server in real-time. Editing and alteration of data shall be limited per category of user, but must be approved by the CPCD and ITD Head.

All gathered paper survey questionnaires shall be scanned and kept on file for verification purposes.

A file on data collection monitoring shall be kept on file for verification purposes.

7. HCSM Questionnaire

UCPBS is mandated to use the HCSM questions prescribed by ARTA as stated in ARTA Guidelines on the Implementation of the HCSM, i.e., MC-2022-05's Annex A. It includes:

- a. Three (3) questions related to the Citizen's Charter;
- b. One (1) question related to the client's overall satisfaction with the service availed; and
- c. Eight (8) questions related to the following SQD:
 - i. Responsiveness
 - ii. Reliability
 - iii. Access and Facilities
 - iv. Communication
 - v. Costs
 - vi. Integrity
 - vii. Assurance
 - viii. Outcome
 - ix. Inclusivity and accessibility
 - x. Consistency of experience across branches
- d. The HCSM questions prescribed are fixed and may not be altered, modified, or deleted.
- e. Service-specified questions to the HCSM may be added, but the revised version must not exceed five (5) minutes for the client to accomplish. The result of the additional questions shall not be included in the computation of the overall score.
- f. HCSM shall be in English and Filipino versions and may be translated to the local dialect, provided that the revised version will still be able to capture the SQDs.
- g. Demographic Questions. The prescribed demographic questions shall be used.
- h. Open-ended Questions. The HCSM shall have an open-ended question at the end of the form where the client has the option to provide additional remarks or feedback not covered by the previous questions.

8. Rating Scale and Scoring System

- a. Rating Scale. A Five (5) point Likert Scale to measure the SQDs shall be used:

SCALE	RATING
1	Strongly Disagree

2	Disagree
3	Neither agree nor disagree
4	Agree
5	Strongly agree

- b. **Scoring per Question.** The percentage of respondents that rated “agree” and “strongly agree” shall be used to get each SQD’s score. Where a question was answered with two (2) or more check marks, the answer to the item shall be considered as invalid.
- c. **Overall Scoring.** The percentage of the respondents that rated ‘agree’ and ‘strongly agree’ for the 8 SQDs shall be used to compute the overall score. UCPBS aims to achieve an overall percentage of 80% or higher or a rating of ‘satisfactory’ or higher. Interpretation of the results shall be as follows:

PERCENTAGE	RATING
95.0% - 100 %	Outstanding
80.0% - 94.9%	Satisfactory
60.0% - 79.9%	Fair
Below 60%	Poor

9. Data Collection Quality Control

To be able to ensure that the data gathered from the HCSM is of the highest quality possible, quality control procedures should be implemented, as required in Annex B-Client Satisfaction Measurement Report of MC 2022-05 (Guidelines on the Implementation of the Harmonized Client Satisfaction Measurement). This includes the following:

- Automated Data Entry Platform
- Standardized Data Encoding Procedures
- Standardized Data Collection Monitoring Procedures
- Supervised Data Collection Team and Spot-Checking Conduct
- Back-checking before Data Processing

10. Data Processing

The data table processing will involve descriptive statistics and several cross-tabulations, depending on the data requirements.

Any significance testing should be done at a 95% confidence level but may be at a 90% confidence level, depending on the questions that are being tested for significance.

11. Non-Disclosure of Respondent’s Identity

As part of the ESOMAR codes and guidelines, the identity of the respondents will be kept confidential from the ARTA, GCG, and UCPBS. If there is a requirement from the GCG or UCPBS to reveal the identity of the respondents, the consent of the respondents will be sought. It should be noted that the information on the identity of respondents

will be limited to their addresses /locations. However, if the respondents want to keep their locations/ addresses confidential and detached from the survey results, this will be adhered to by the researcher.

12. Data Privacy and Confidentiality

To ensure confidentiality, the project team of the Third-Party Service Provider and all their partners should sign a Non-Disclosure and Confidentiality Agreement. The data should only be used for the purposes of this particular customer satisfaction survey and should not be shared with anyone who is not involved in the Project.

13. Analysis Plan

The Third-Party Service Provider shall undertake the analysis required as per Annex B: Client Satisfaction Measurement Report of ARTA MC 2022-05 (Guidelines on the Implementation of the HCSM).

- a. Response rates (per service)
 - i. Total number of transacting clients during the period (per service);
 - ii. Client demographic profile;
 - iii. Citizen's charter (CC) results;
 - iv. Overall client satisfaction measurement score;
 - v. Service quality Dimension (SQD) results;
 - vi. Breakdown of transactions corresponding to each service offered;
 - vii. Results per branch, branch lite, and lending office;
 - viii. Free response
 - i. Themes of Client's Remarks/Suggestions
 - ii. Reasons for Services with 0 responses
 - iii. Breakdown of client demographics
 - iv. Breakdown of CC Questions and SQD questions by result count
 - v. Breakdown of each service's scores;

14. Contents of the Final Report

The Third-Party Service Provider shall present the results following the template/outline provided in Annex B: Client Satisfaction Measurement Report of ARTA MC 2022-05 (Guidelines on the Implementation of the HCSM), to include the signed endorsement by the head of CART.

15. Project Team

The Third-Party Service Provider to be contracted by UCPBS is recommended to follow the structure below to promote an organized and efficient working environment.

POSITION	NUMBER	TASK
Survey Project Manager (SPM)	1	Crafts and oversees the overall design and implementation of the 2025 HCSM.
Technical Consultant	1	Ensures the ARTA and GCG guidelines are complied with.
Lead Research Analyst	1	Spearheads the data interpretation, report writing, and presentation of results to the Agency.
Lead Statistician & Survey	1	Designs the survey data capture mechanism; uploads the questionnaire and ensures correct

POSITION	NUMBER	TASK
Administrator		skipping of questions with the support of the data processing team and SPM.
Data Validators	4	Ensure that all data is valid and verified.

16. Submission and Publishing

UCPBS will submit the HCSM report on or before April 15, 2026, to ARTA. The report shall thus be submitted by the Third-Party Service Provider at least a month before this deadline.

17. Other Requirements

- All tables shall be supported by a narrative description and explanation
- All reports shall contain analysis/ interpretation, validation, and recommendations; and
- UCPBS shall have intellectual rights over the survey questionnaire/form to be finalized by the Third-Party Service Provider, and confidentiality of the results and reports.

V. Approved Budget for the Contract (ABC)

The approved budget for the Contract is **Two Million five hundred thousand pesos only (Php2,500,000.00)**, all-in, inclusive of all applicable taxes, logistics, permit fees, transportation, out-of-pocket, and all other related expenses necessary to completely accomplish the project.

VI. Project Time Frame and Payment Schedule

ACTIVITIES	DELIVERABLES	TIMELINE	PAYMENT
Inception Meeting	Inception Report	4 weeks after the signing of the contract.	20%- Project Mobilization
Data processing and analysis for the HCSM on all transactions and progress reports of the Bank's HCSM.	Progress Report on the Bank's HCSM activities.	4 weeks after the completion of data collection.	30%- Completion
Submission of the final report and pertinent annexes.	Final report and annexes required.	8 weeks after the submission of the final report.	50%- Submission of Final Report and Presentation of Results

*calendar days

- Project implementation shall be based on a detailed project timetable to be agreed upon between UCPBS and the winning Third-Party Service Provider based on the identified outputs/milestones.

- b. If the Third-Party Service Provider fails to deliver any or all of the services within the period(s) specified in the contract, UCPBS shall, without prejudice to its other remedies under the contract and under the Applicable Law, deduct from the contract price, as liquidated damages, a sum equivalent to one-tenth of one percent of the price of the unperformed portion of the services for each day of delay based on the approved contract schedule. Once the maximum amount of liquidated damages reaches ten percent (10%) of the total amount of the contract, UCPBS may consider termination of the contract pursuant to General Conditions of Contract (GCC) Clause 27.
- c. Payment of incomplete services will be based on quantum meruit.
- d. In the event error/s or inconsistencies during project implementation is/are committed by the Third-Party Service Provider, the cost of undertaking corrective activities or actions, as may be necessary, shall be shouldered by the Third-Party Service Provider.
- e. UCPBS reserves the right to refuse acceptance of outputs/deliverables submitted by the Third-Party Service Provider that are found bearing inaccurate/ questionable content (i.e., data/findings/insights) or sub-standard quality of presentation. The Third-Party Service Provider shall be given the chance to remedy the rejected outputs/ deliverables through rework, revisions, or amendments.
- f. OGCC Review. All agreements to be executed by the parties in relation to the project/ transaction shall be subject to prior review/clearance of the Office of the Government Corporate Counsel(OGCC). The comments and suggested revisions of the OGCC shall form part of the agreement and be binding on the parties.
- g. In the event the GCG, the regulatory body that requires and governs the conduct of the Customer Satisfaction Survey (CSS), issues directives that will require UCPBS to adopt modifications to the standards and procedures in the conduct of CSS, UCPBS reserves the right to apply such modification in the terms stated herein to conform to the issuance or directive of the GCG.

VII. Terms of Engagement

The engagement of the Third-Party Service Provider shall commence from the issuance of the Notice to Proceed and terminate upon acceptance of the revised final reports by UCPBS in accordance with the *"Guidebook for GOCCs: Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey"* issued by GCG, subject to extension at the option of UCPBS.

It is understood that the Consultancy Services do not create employee-employee relations between the Third-Party Service Provider and UCPBS; and that the former is not entitled to any benefits enjoyed by regular personnel of UCPBS.

VIII. Qualification of the Third-Party Service Provider

UCPBS expects the Third-Party Service Provider to meet the qualifications set forth herein:

- 1. A relevant valid business license to provide such services to the Parties.
- 2. At least three (3) years of experience in conducting stakeholders' surveys, from formulating the Methodology to reporting the analyses;
- 3. Adequate (at least a team of 5 key personnel) and experienced resources to conduct such engagement as well as to prepare for and attend meetings as required by UCPBS.
- 4. A Non-Disclosure Agreement to prevent divulging confidential information.;
- 5. ISO 9001-2015 Certified; and

6. Certified or Registered with the National Privacy Commission.

IX. Termination

UCPBS may, subject to five (5) days advance notice, terminate the contract with the Vendor or cancel the purchase order (PO) it issued to the Supplier, on any of the following grounds:

- a. Misrepresentation by the selected vendor of any matter which UCPBS deems material or
- b. Failure by the selected vendor to deliver the goods and services to the satisfaction of UCPBS on the Delivery Schedule.

Notwithstanding any provision in the General and Special Conditions of Contract, UCPBS may pre-terminate the contract, subject to a notice to the Vendor within thirty (30) days prior to the date of pre-termination.

X. Confidentiality and Data Privacy

- a. The Third-Party Service Provider shall ensure that all information shared by UCPBS under this project shall remain confidential even after the termination of the contract;
- b. The Third-Party Service Provider shall be required to follow the rules on confidentiality and code of ethics as applicable to officials of the public service;
- c. The Third-Party Service Provider shall be required to comply with the provisions of Republic Act No. 10173 (Data Privacy Act) in the collection and processing of personal information of data subjects, including the execution of a data sharing agreement with UCPBS, as may be warranted.

XI. Indemnity

The Third-Party Service Provider shall be required to defend and hold UCPBS, its officers, officials, employees and associates free and harmless from any and all claims, injuries, damages, losses, or suits including attorney fees, arising out of or resulting from the acts, errors or omissions of the Third-Party Service Provider in the performance of its work;

The Third-Party Service Provider shall be required to fully indemnify UCPBS in the event of liability for claims, injuries, damages, losses, or suits, including attorney fees, arising out of or resulting from the acts, errors, or omissions of the Third-Party Service Provider in the course of its work.

XII. Assignment of Rights

UCPBS shall have the right to assign its rights and obligations under the agreement to be executed with the Third-Party Service Provider, subject only to a notice to such Third-Party Service Provider.

XIII. Obligations of the Third-Party Service Provider

- a. Process the personal data only upon the documented instructions of the personal information controller, including transfer of personal data to another country or an international organization, unless such transfer is authorized by law;
- b. Ensure that an obligation of confidentiality is imposed on persons authorized to process the personal data;
- c. Implement appropriate security measures and comply with the Act, these Rules, and other issuances of the Commission;
- d. Not engage another processor without prior instruction from the personal information controller;
- e. Assist the personal information controller, by appropriate technical and organizational measures, and to the extent possible, fulfill the obligation to respond to requests by data subjects relative to the exercise of their rights;
- f. Assist the personal information controller in ensuring compliance with the Act, these Rules, other relevant laws, and other issuances of the Commission, taking into account the nature of processing and the information available to the personal information processor;
- g. At the choice of the personal information controller, delete or return all personal data to the personal information controller after the end of the provision of services relating to the processing; Provided, that this includes deleting existing copies unless storage is authorized by the Act or another law;
- h. Make available to the personal information controller all information necessary to demonstrate compliance with the obligations laid down in the Act, and allow for and contribute to audits, including inspections, conducted by the personal information controller or another auditor mandated by the latter;
- i. Immediately inform the personal information controller if, in its opinion, an instruction infringes the Act, these Rules, or any other issuance of the Commission.

XIV. Minimum Qualification of the 3rd party Provider

CRITERIA	
A. Applicable Experience of the Third-Party Service Provider	
1.	Five (5) years of experience in the business/track record as a Research Service Agency
2.	Five (5) completed survey contracts of a similar nature within the last ten (10) years
B. Qualification of Personnel to be assigned to the Project	
Qualification of Key Personnel (Education)	
1.	Survey Project Manager
2.	Technical Consultant
3.	Lead Research Analyst
4.	Lead Statistician and Survey Administrator
5.	Data Validators (4)

C. Current Workload Relative to Capacity of the Third-Party Service Provider
Number of ongoing survey contracts

"Similar nature of contract" shall mean a project that involves the design and implementation of a customer satisfaction research

a. Technical Evaluation Criteria and Financial Evaluation Procedure

UCPBS shall evaluate bids using the Quality-Cost Based Evaluation/ Selection (QCBE/QCBS) procedure. The **technical proposal (70%)** together with the **financial proposal (30%)** shall be considered in the ranking of bidders.

The technical proposals shall be evaluated first using the criteria below. The financial proposals of the bidders who meet the minimum technical score [total weighted score of three (3) points] shall then be opened. Refer to Annex C for the detailed criteria and rating system for Technical Evaluation and Annex D for the Financial Evaluation Procedure.

The BAC shall rank the bidders in descending order based on the combined numerical ratings of their technical and financial proposals and identify the Highest Rated Bid. The rating shall be subject to the approval of the HoPE through BAC. After approval by the HoPE of the Highest Rated Bid, the BAC shall notify and invite the bidder with the Highest Rated Bid for negotiation.

CRITERIA	WEIGHTS	
TECHNICAL	70%	
A. Quality of personnel to be assigned to the Project	30%	70%
1. General Qualifications of an Overall Project Manager		
o Education	2%	
o Relevant training/ seminar	3%	
o Adequacy of work experience	10%	
2. General Qualification of Technical Personnel (<i>at least 5 individuals</i>)		
o Education		
o Relevant training/ seminar		
o Adequacy of work experience		
B. Experience and Capability of the Third-Party Service Provider	30%	
1. Years of experience in the business/ track record as a Research Service Agency	10%	

2. Number of completed survey contracts of a similar nature	10%	
3. Evaluation of past performance	10%	
C. Approach and Methodology	40%	
1. Organization, clarity, completeness, and comprehensiveness of the technical work plan	15%	
2. Workflow/approach and timetable	15%	
3. Detailed deliverables in accordance with the given research output standards	10%	
FINANCIAL	30%	
Project Costs The cost will be an important consideration in the selection, although it will not be the sole determining factor.	30%	
TOTAL	100%	

XV. Specification for Proposals

All proposals submitted in response to this request for proposal must contain the following information:

- Name, address, telephone number, email address (including name and title of person responsible for submitting this proposal);
- Mayor's/ Business permit, Professional License/ Curriculum Vitae (Consulting Services), PhilGEPS Reg. Number, Income/Business Tax Return, BIR Registration of the Vendor, and Description of the organization (individual/partnership, corporation, others); they should be valid at the time of the submission of bids, Post-Qualification Evaluation, and signing of the contract.
- Name and biography of all proposed consultants/ research team that will be directly involved in this project;
- A list of clients for whom similar work has been performed, including three referees that the UCPBS may contact regarding the job evaluation exercise conducted in similar-sized organizations.
- Project steps to complete the project and proposed timeline of work tasks with the date of final completion of the project.
- Expected outcomes/ output and deliverables.
- Project costs including a breakdown of the company's rates, fees, and charges for services by phase, any additional reimbursable expenses, and proposed payment schedule in Philippine peso and VAT inclusive price and/or TAX if applicable to any fees/ charges.

Notes:

1. Each and every page of the Bid Form must be signed by the bidder or the bidder's authorized representative. The authorization should also be attached. Failure to do so shall be a ground for the rejection of the Bid.
2. The BAC expects the bidders to exercise due diligence in going through the bid documents to prepare bids intelligently.
3. All supporting documents related to the declared list of employment/s and attended training/s relevant to assigned project tasks of all personnel in the submitted CV shall be presented by Single/Highest Rated Bidder (S/HRB) to UCPBS BAC/TWG through the BAC Secretariat for checking during the post-qualification evaluation.

XVI. Governing Legal Framework:

This procurement shall be governed by the pertinent provisions of both Republic Act (RA) No. 9184 and its 2016 revised Implementing Rules and Regulations (IRR) , and the new RA No. 12009, otherwise known as the "New Government Procurement Act," and its 2025 IRR.

This is in recognition of the ongoing three-year transition period and the current availability of bidding document templates from the Government Procurement Policy Board (GPPB), which are based on RA 9184. Bidders are advised that any ambiguity between the two legal frameworks will be resolved by adhering to the principles and mandatory provisions of RA No. 12009.

ANNEX A

HARMONIZED CLIENT SATISFACTION MEASUREMENT UCPB SAVINGS, INC. (UCPBS)

ONLINE VERSION

(WITH ADDITIONAL QUESTIONS RELATED TO THE 2 SODs)

Handwritten signature or initials in the bottom right corner of the page.

CLIENT SURVEY INFORMATION

Printing View

CUSTOMER INFORMATION

CLIENT NAME:

GENDER:

☐ Male ☐ Female

EMAIL:

(Optional)

CONTACT NUMBER:

CIVIL STATUS:

-- Select --

CLIENT TYPE:

- ☐ Citizen
☐ Business
☐ Government (Employee or another agency)

SERVICES:

-- Select --

REGION:

-- Select --

EDUCATIONAL ATTAINMENT:

-- Select --

WORK STATUS:

-- Select --

RESPONDENT AGE GROUP:

-- Select --

SERVICE AVALIAMENT DATE:

SURVEY DATE:

01/28/2024

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SW

INSTRUCTIONS

CHECK MARK (✓) YOUR ANSWER TO THE CITIZEN'S CHARTER (CC) QUESTIONS. THE CITIZEN'S CHARTER IS AN OFFICIAL DOCUMENT THAT REFLECTS THE SERVICES OF A GOVERNMENT AGENCY/OFFICE INCLUDING ITS REQUIREMENTS, FEES AND PROCESSING TIMES AMONG OTHERS.

QUESTIONS

CC1. Which of the following best describes your awareness of a CC ?

- ☐ A. I knew what a CC is, and I saw this office's CC.
- ☐ B. I know what a CC is, but I did NOT see this office's CC.
- ☐ C. I heard of the CC only when I saw this office's CC.
- ☐ D. I do not know what a CC is, and I did not see one in this office. (Answer "N/A" on CC2 and CC3)

CC2. If aware of CC (answered 1-3 in CC1), would you say that the CC of this office was _____ ?

- ☐ A. Easy to see
- ☐ B. Somewhat easy to use
- ☐ C. Difficult to see
- ☐ D. Not visible at all
- ☐ E. N/A

CC3. If aware of CC (answered codes 1-3 in CC1), how much did the CC help you in your transaction ?

- ☐ A. Helped very much
- ☐ B. Somewhat helped
- ☐ C. Did not help
- ☐ D. N/A

← Back

Next →

↑
SW

CLIENT SURVEY INFORMATION

Please print clearly

INSTRUCTIONS:

For SQD 0-8, please put a check mark (✓) on the column that best corresponds to your answer.

RATING SCALE

	Strongly Agree	Agree	Neither Disagree	Disagree	Strongly Disagree	N/A (Not Applicable)
SQD0. I am satisfied with the service that I received.	☐	☐	☐	☐	☐	☐
SQD1. I spent a reasonable amount of time for my transaction.	☐	☐	☐	☐	☐	☐
SQD2. The office followed the instruction's requirements and steps listed on the information provided.	☐	☐	☐	☐	☐	☐
SQD3. The steps (including payment) I needed to do for my transaction were easy and simple.	☐	☐	☐	☐	☐	☐
SQD4. I easily found information about my transaction from the office or its website.	☐	☐	☐	☐	☐	☐
SQD5. I paid a reasonable amount of fees for my transaction.	☐	☐	☐	☐	☐	☐
SQD6. I feel the office was fair to everyone, or "wufang paiqie" during my transaction.	☐	☐	☐	☐	☐	☐
SQD7. I was treated courteously by the staff, and (if asked for help) the staff was helpful.	☐	☐	☐	☐	☐	☐
SQD8. I got what I needed from the government's office, or (if denied) denial of request was successfully explained to me.	☐	☐	☐	☐	☐	☐

Suggestions on how we can further improve our service (optional):

Type Here

← Back

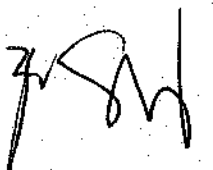
Submit →

Handwritten signature/initials.

**HARMONIZED CLIENT SATISFACTION
MEASUREMENT
UCPB SAVINGS, INC. (UCPBS)**

QUESTIONNAIRE

(WITH ADDITIONAL QUESTIONS RELATED TO THE 2 SODs)

A handwritten signature in black ink, appearing to be 'J. Smith' or similar, located in the bottom right corner of the page.

Control No: _____ (Branch plus sequence. Ex: Alabang-001)



HELP US SERVE YOU BETTER!

This Client Satisfaction Measurement (CSM) tracks the customer experience of government offices. Your feedback on your recently concluded transaction will help this office provide better service. Personal information shared will be kept confidential, and you always have the option not to answer this form.

Name: _____ Date of Transaction: _____
 Date of Survey: _____ Time of Survey started: _____
 Sex: ☐ Male ☐ Female
 Civil Status: ☐ Single ☐ Married ☐ Separated ☐ Widow
 Client type: ☐ Citizen ☐ Business ☐ Government (Employee or another agency)
 Education: ☐ No Formal Education ☐ Elementary Level
 ☐ Elementary Graduate ☐ High School Level
 ☐ Vocational Graduate ☐ College Level
 ☐ College Graduate ☐ Post Graduate
 Employment Status: ☐ Student ☐ Employed
 ☐ Working Student ☐ Not Employed / Not a student
 Age: _____
 Region of residence: _____ Service Availed: _____
 Mobile Number: _____ Email: _____ (optional)

INSTRUCTIONS: Check mark (✓) your answer to the Citizen's Charter (CC) questions. The Citizen's Charter is an official document that reflects the services of a government agency/office, including its requirements, fees, and processing times, among others.

- CC1** Which of the following best describes your awareness of a CC?
- ☐ 1. I know what a CC is, and I saw this office's CC.
 - ☐ 2. I know what a CC is, but I did NOT see this office's CC.
 - ☐ 3. I learned of the CC only when I saw this office's CC.
 - ☐ 4. I do not know what a CC is, and I did not see one in this office. (Answer 'N/A' on CC2 and CC3)
- CC2** If aware of CC (answered 1-3 in CC1), would you say that the CC of this office was ...?
- ☐ 1. Easy to see
 - ☐ 2. Somewhat easy to see
 - ☐ 3. Difficult to see
 - ☐ 4. Not visible at all
 - ☐ 5. N/A
- CC3** If aware of CC (answered codes 1-3 in CC1), how much did the CC help you in your transaction?
- ☐ 1. Helped very much
 - ☐ 2. Somewhat helped
 - ☐ 3. Did not help
 - ☐ 4. N/A

INSTRUCTIONS:

For SQD O-8, please put a check mark (✓) on the column that best corresponds to your answer.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	N/A Not Applicable
SQD0. I am satisfied with the service that I availed.						
SQD1. I spent a reasonable amount of time for my transaction.						
SQD2. The office followed the transaction's requirements and steps based on the information provided.						
SQD3. The steps (including payment) I needed to do for my transaction were easy and simple.						

Handwritten signature/initials

SQD4. I easily found information about my transaction from the office or its website.						
SQD5. I paid a reasonable amount of fees for my transaction.						
SQD6. I feel the office was fair to everyone, or "walang palakasan", during my transaction.						
SQD7. I was treated courteously by the staff, and (if asked for help) the staff was helpful.						
SQD8. I got what I needed from the government office, or (if denied) denial of request was sufficiently explained to me.						

Suggestions on how we can further improve our services (optional):

THANK YOU!

Time of Survey ended: _____

Method of Survey (Pick one):

☐ Paper and Pen

Signature: (For walk-in or visited clients) _____

☐ Call

Name and Signature of Interviewer: _____

Date and Time this survey form was transferred to CLICKS UCPBS Application: _____

Signature of Employee: _____

Note:

Please scan and keep a copy: Hardcopies shall be forwarded to UCPBS HO on January 02, 2025, c/o Customer Management Department, CPCD.

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SN

Republic of the Philippines



Government Procurement Policy Board