



LANDBANK

SERVING
THE NATION

**SUPPLEMENTAL/BID BULLETIN NO. 1
For LBP-HOBAC-ITB-CS-20220627-01**

PROJECT : **Nationwide Customer Satisfaction Survey**
IMPLEMENTOR : **HOBAC Secretariat Unit**
DATE : **September 23, 2022**

This Supplemental/Bid Bulletin is issued to modify, amend and/or clarify certain items in the Bid Documents. This shall form an integral part of the Bid Documents.

Modifications, amendments and/or clarifications:

- 1) The bidder/s are encouraged to use the Bid Securing Declaration as Bid Security.
- 2) The Terms of Reference (Section VI), Consultant's References (TPF2), Summary of Costs (FPF 2) and Checklist of Bidding Documents (Item 3 of Technical Proposal and Item 2 of Financial Proposal) have been revised. Please see attached revised TPF 2 and FPF 2 and specific sections of the Bidding Documents.
- 3) Responses to bidder's clarifications/queries (Annex E).


ATTY. HONORIO T. DIAZ, JR.
Head, HOBAC Secretariat

Project Identification Number	LBP-HOBAC-ITB-CS-20220637-01
Project Name	Nationwide Customer Satisfaction Survey
Subject	Response to Bidder's Queries

	Query	Response
1.	The prescribed methodology is Telephone Interview, we would like to confirm if LANDBANK is able to provide a listing by bank unit of its customer including their contact information	<ul style="list-style-type: none"> • LANDBANK will provide the winning bidder with the database of individual and institutional clients per business segment (Branches/Branch Lite Units, Digital Banking, Lending Centers/Units, Trust Banking, Treasury & Investment Banking, and Agrarian Services Units) and their respective contact information (landline and/or mobile number)
2.	Is the client population data by bank unit per area also available	<ul style="list-style-type: none"> • Per terms of Reference's Project Scope (Item C), <i>"the survey should enable LANDBANK to assess results on per Bank Unit (Branches Group, Digital Banking, Lending Operations, Trust Banking, Treasury & Investment Banking and Agrarian Services Units), by area/region (total Luzon, Visayas and Mindanao), type of service availed, rating and driver of satisfaction."</i>

Section VI. Terms of Reference

Nationwide Customer Satisfaction Survey

A. Name and Description of the Project

The **Land Bank of the Philippines (LANDBANK)** is a government financial institution with a social mandate of promoting countryside development. Over the years, LANDBANK has evolved into a full-service commercial bank. It ranks among the top five commercial banks in the country in terms of deposits, assets, loans and capital.

The LANDBANK invites proposals from Third-Party Consultant/Consulting Firm to do the Nationwide Customer Satisfaction Survey (NCSS) for depositors and customers of the Branches/Branch Lite Units, Digital Banking, Lending Centers/Units, Trust Banking, Treasury & Investment Banking, and Agrarian Services Units.

As a policy for quality, LANDBANK measure success in the ability to deliver quality products and services that effectively address the needs and expectations of its clients. Thus, since CY 2015, LANDBANK commissioned the services of a Third-Party Consultant/Consulting Firm to conduct the NCSS.

To continuously measure, assess and enhance customer satisfaction, LANDBANK will implement another one (1) year (CY 2022). Likewise, survey method to be used is in accordance with the customer satisfaction survey standards prescribed by the Governance Commission for Government-Owned and –Controlled Corporations (GCG).

The results for LANDBANK on the overall customer satisfaction rating will be submitted to GCG. This is in compliance with the performance agreement of the Bank in order to anticipate the needs and provide new/enhanced products and services to the customers.

For this purpose, LANDBANK shall require the services of a reputable consulting firm to conduct this year NCSS.

B. Project Objectives

The objectives of the customer satisfaction survey are as follows:

- a) Determine and measure customer satisfaction of existing customers;
- b) Assess and measure the quality of service provided by Branches/Branch Lite Units, Digital Banking, Lending Centers/Units, Trust Banking, Treasury & Investment Banking and Agrarian Services Units;
- c) Assess and measure customer satisfaction on ATM service, phone banking and internet banking facilities;

- d) Assess the responsiveness of Bank's products and services to customer's needs;
- e) Identify new or emerging customer's needs;
- f) Determine future requirements of LANDBANK customers;
- g) Find out why others choose banks instead of LANDBANK;
- h) Recommend short and long term action plans for the efficient and effective delivery of its services, more importantly on areas where gaps are identified; and
- i) Support LANDBANK's commitment to the Performance Scorecard based on GCG customer satisfaction standards.

C. Project Scope

The scope of the project shall cover one (1) year (CY 2022), inclusive of the nineteen (19) weeks timeline of deliverables through engagement of the services of Third-Party Consultant/Consulting Firm, which deliverables consist of but are not limited to the following:

- Questionnaire Design/Preparation
 - The survey questionnaire will be developed in a format/content mutually agreed by LANDBANK and the Third-Party Consultant/Consulting Firm as prescribed by GCG.
- Data Collection
 - LANDBANK shall have the right of attending general briefing and debriefing sessions and observing actual telephone interview.
 - The actual length of telephone interviews is limited to fifteen (15) minutes at the maximum in accordance with the guidelines on methodology and standard prescribed by GCG.
- Data Processing/Entry or Tabulation
 - Status Report to be submitted on a weekly basis
- Analysis of Results
 - Topline Report (Overall Satisfaction Rating)
 - Full Narrative Report
- Preparation and submission of the final report and recommendations for possible courses of action
 - The survey should enable LANDBANK to assess results on per Bank Unit (Branches Group, Digital Banking, Lending Operations, Trust Banking, Treasury & Investment Banking and Agrarian Services Units), by area/region (total Luzon, Visayas and Mindanao), type of service availed, rating and driver of satisfaction.
- Presentation of the full narrative report to management and submission of project progress report based on GCG requirements.

D. Sample Size and Methodology of the Survey

- a. The survey shall cover a total of **2,000** respondents for LANDBANK from Branches/Branch Lite Units, Digital Banking, Lending Operations, Trust Banking, Treasury & Investment Banking and Agrarian Service Units.
- b. Research Design

The Third-Party Consultant/Consulting Firm shall comply with the survey methodology and standards prescribed by GCG.

GCG Advisory	Date Released
The Enhanced Standard Guidelines on the Conduct of Customer Satisfaction Survey	26 September 2019
Additional Guidelines in the Conduct of the Customer Satisfaction Survey for 2020 in GOCC Sector	14 August 2020
Extension of Additional Guidelines in the Conduct of the Customer Satisfaction Survey for 2021 in GOCC Sector	26 February 2021
Extension of Additional Guidelines in the Conduct of the Customer Satisfaction Survey (CSS) for 2020 in the GOCC Sector to the conduct of the CSS for 2022	18 January 2022

To meet the project objectives for this year, the quantitative study to be used is telephone interviews.

The Third-Party Consultant/Consulting Firm should be capable of capturing questionnaire responses via telephone interviews.

E. Timeline of Project Deliverables

The time of the project deliverables is nineteen (19) weeks and shall commence within five (5) calendar days after receipt of the Notice to proceed by the winning Third-Party Consultant/Consulting Firm.

Activity	Deliverables	Timeline
1. Inception meeting and discuss of sampling design, methodology, protocols and work plan	<ul style="list-style-type: none"> • Data Processing and Confidentially Agreement • Inception Report 	1 week
2. Review, add questions specific to the GOCC (optional) format and translate survey instrument	<ul style="list-style-type: none"> • CSS Questionnaire + Draft Rider (if any) 	1 week
3. Pilot testing of survey instrument and feedback	<ul style="list-style-type: none"> • Pre-test Report and Supporting Documents 	2 weeks

for possible revisions (optional, if there are major additions)		
4. Finalization of survey instrument	<ul style="list-style-type: none"> Final CSS Questionnaire + Final Rider Questionnaire (if any) 	1 week
5. Recruitment, training and submission of final list of field team to be deployed nationwide	<ul style="list-style-type: none"> Training Report and Supporting Documents 	2 weeks
6. Data collection set up (including production and preparation of telephone survey materials)		2 weeks
7. Data collection proper	<ul style="list-style-type: none"> Observation Report and Clearing/Debriefing Report Fieldwork Progress Report Supervision and Observation Report 	4 weeks
8. Data cleaning and validation, and computation of descriptive statistics	<ul style="list-style-type: none"> Back-Checking and Spot Checking Report Data Quality Control Report 	3 weeks
9. Writing and submission of reports (Topline report to be submitted not later than January 16, 2023)	<ul style="list-style-type: none"> Top Line Report Full Narrative (Final) Report 	3 weeks
10. Presentation of final report to Management Committee and other banks committees concerned (Full Narrative report to be submitted not later than February 13, 2023)		
TOTAL DURATION		19 weeks

F. Approved Budget for the Contract

The approved budget for this contract is **PHP 3,600,000.00**, inclusive of all applicable taxes and out-of-pocket expenses.

a. Cost Breakdown

Cost Component	Cost (PHP)
Questionnaire design and production (qualitative & quantitative)	X, XXX,XXX.XX
Data Collection	X, XXX,XXX.XX

Data Processing/Entry or Tabulation	x, xxx,xxx.xx
Analysis of Results	x, xxx,xxx.xx
Preparation of the final report and recommendations for possible courses of action	x, xxx,xxx.xx
Presentation of the final report to management and submission of project progress report based on GCG requirements	x, xxx,xxx.xx

TOTAL PROJECT COST (inclusive of 12% VAT) per conduct of NCSS	Phpx,xxx,xxx.xx
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b. Payment Milestones

Activities	% Payment
Delivery of Implementation Methodology Documents	10%
Submission of Top Line Report	40%
Submission of the Full Narrative Report	50%

G. Qualification Requirements

1. Shortlisting Criteria

Evaluation Criteria	Minimum Required Standards	Documentary Requirements
<p>A. Firm Credentials (Experience, Expertise and Capability)</p> <p>This criterion evaluates the bidder-Consultant's/ Consulting Firm's experience, expertise and capability to deliver the proposed project.</p>	<p>Bidders must:</p> <ol style="list-style-type: none"> 1. Be operating for at least ten (10) years in the research business. 2. Have engagements similar* in size and scope with at least two (2) local clients in the last three (3) years, one of which must be a Bank/financial institution using similar toolsets proposed by LANDBANK. 3. Have nationwide telephone survey capability and resources (with capability to capture responses via telephone transmission) <p><i>* Similar engagement shall refer to a customer satisfaction survey.</i></p>	<p>Bidders must submit the following documents:</p> <ol style="list-style-type: none"> 1. Securities and Exchange Commission (SEC) Certificate 2. Proof of engagement to be issued by the clients of the Bidders 3. Proof of capability to be issued by the clients of the Bidders

B. Personnel Qualifications		
This criterion assesses the relevant work experience and educational attainment of the bidder's key personnel (i.e., Project Manager, Technical Staff) identified to implement the project.		
Key Personnel	Minimum Qualifications	Documentary Requirements
1. Overall Project Manager	<ul style="list-style-type: none"> ✓ At least three (3) years actual experience in research/project management ✓ At least one (1) year successful implementation of the project in banking or financial institution. 	Curriculum Vitae and Statement of Technical Competence which must include, as a minimum, the following information: <ul style="list-style-type: none"> • Work experience relevant to the qualifications • Trainings relevant to the qualifications • Projects handled and nature of involvement
2. Assistant Project Manager	<ul style="list-style-type: none"> ✓ At least three (3) years actual experience in research/project management ✓ At least one (1) year successful implementation of the project in banking or financial institution. 	
3. Statistician/ Quantitative Expert	<ul style="list-style-type: none"> ✓ At least three (3) years actual experience in research/project management ✓ At least one (1) year successful implementation of the project in banking or financial institution. 	
4. Overall Field Manager	<ul style="list-style-type: none"> ✓ At least three (3) years actual experience in research/project management ✓ At least one (1) year successful implementation of the project in banking or financial institution. 	
5. Overall Data Processing Manager	<ul style="list-style-type: none"> ✓ At least three (3) years actual experience in research/project management ✓ At least one (1) year successful implementation of the project in banking or financial institution. 	
6. Technical Team (i.e., Field Supervisors, Data	<ul style="list-style-type: none"> ✓ At least two (2) years actual experience in research/project 	

Key Personnel	Minimum Qualifications	Documentary Requirements
Processing Supervisors)	management	

2. Technical Criteria

Evaluation Criteria	Minimum Required Standards
<p>A. Implementation Methodology This criterion evaluates the proposed implementation approach with regards to the logical and systematic sequencing of activities, realistic estimation of work effort and duration, timely and quality delivery of work products, management of project schedule, scope and resources, and the overall soundness of the implementation methodology.</p>	<p>Bidders' proposed project must clearly discuss the following:</p> <ol style="list-style-type: none"> 1. Implementation and project management methodology <ul style="list-style-type: none"> • Statement of Work <ul style="list-style-type: none"> ➤ Executive Summary/Brief Company Profile ➤ Salient Features of Proposed Methodology ➤ Detailed, Point-by-Point Response to Project Objectives and Deliverables • Scope of Service <ul style="list-style-type: none"> ➤ Detailed description of all major tasks ➤ Deliverable item, if any, for each of the major tasks; and ➤ Completion criteria of each of the major tasks 2. Assumptions, Constraints, Dependencies 3. Schedules <ul style="list-style-type: none"> • Major Milestones • Delivery Schedule, and • Project Schedule (major tasks, durations, start and end dates, Gantt Chart) 4. Organizational Chart of the Project Team
<p>B. Firm Credentials (Customer Satisfaction Survey Rating and Support Center) This criterion evaluates the bidder-Consultant's/ Consulting Firm's experience, expertise and capability to deliver the proposed project, as well as the results of satisfaction ratings of previous engagements.</p>	<ul style="list-style-type: none"> ✓ Submit at least three (3) Certificates of Satisfactory Performance for previous successful engagements with Bank/financial institution. ✓ Bidder must have or must set up a Support Center or Office within the Philippines preferably in NCR, manned by experienced technical support staff. This shall be stipulated in the contract. Provide proof of location or certification that support center is within the Philippines to be issued by the Bidder.

1. In extreme cases where replacement of any member of the team is unavoidable, the new member must possess the minimum qualifications provided in this Terms of Reference (TOR). The replacement of the Overall Project Manager and any of its key personnel identified to implement the project must be communicated by the Third-Party Consultant/Consulting Firm and its Overall Project Manager, respectively, to the Technical Working Group (TWG) thru electronic or written notice at least 30 days prior to the execution of the replacement, for evaluation and approval.
2. The Third-party Consultant/Consulting Firm must ensure the completion of the engagement within the agreed period. Should a change in timeline be necessary, the Overall Project Manager must request in writing for its extension at least five (5) days prior to the agreed timeline to be approved by the appropriate units of LANDBANK.

H. Documentary Requirements

1. Shortlisting Criteria

- a. Firm Credentials (Experience, Expertise and Capability) - This criterion evaluates the bidder- Consultant's/Consulting Firm's experience, expertise and capability to deliver the proposed project.

Minimum Required Standards	Documentary Requirements
<p>Bidders must:</p> <ol style="list-style-type: none"> 1. Be operating at least in the last ten (10) years in the research business. 2. Have engagements similar* in size and scope with at least two (2) local clients in the last three (3) years, one of which must be a Bank/financial institution using similar toolsets proposed by LANDBANK. 3. Have nationwide telephone survey capability and resources (with capability to capture responses via telephone transmission) <p><i>* Similar engagement shall refer to a customer satisfaction survey.</i></p>	<p>Bidders must submit the following documents:</p> <ol style="list-style-type: none"> 1. Securities and Exchange Commission (SEC) Registration Certificate 2. Proof of engagement to be issued by the clients of the Bidders 3. Proof of capability to be issued by the clients of the Bidders

- b. Personnel Qualifications - This criterion assesses the relevant work experience and educational attainment of the bidder key personnel (i.e., Project Manager, Technical Staff) identified to implement the project.

Bidders must submit Curriculum Vitae and Statement of Technical Competence which must include, as a minimum, the following information:

1) Work experience relevant to the qualifications; 2) Trainings relevant to the qualifications; 3) Projects handled and nature of involvement for the minimum personnel qualification requirements for the following key personnel:

- a. Overall Project Manager
- b. Assistant Project manager
- c. Statistician/ Quantitative Expert
- d. Overall Field Manager
- e. Overall Data Processing Manager
- f. Technical Team (i.e. Field Supervisors, Data Processing Supervisors)

2. Technical Criteria

The proposal shall, at the minimum, include the following information/ documents:

- a. **Executive Summary/Brief Company Profile**
- b. Salient Features of Proposed Methodology
- c. Detailed, Point-by-Point Response to Project Objectives and Deliverables
- d. Draft Contract
- e. Scope of Service
 - i. Detailed description of all major tasks,
 - ii. Deliverable items, if any, for each of the major tasks, and
 - iii. Completion criteria for each of the major tasks
- f. Deliverable Items Summary (Description, quantity, delivery media and other details of the deliverables)
- g. Assumptions, Constraints and Dependencies
- h. Schedules
 - i. Major milestones,
 - ii. Delivery schedule, and
 - iii. Project schedule (major tasks, durations, start and end dates)
- i. Exchange of Confidential Information, and Other Agreements
- j. List of Projects and Project Team Information with certificate of satisfactory performance
- k. Analyst reports, articles, brochures, white papers and other relevant materials

I. **Evaluation Criteria**

1. **Shortlisting**

The minimum required score to be included in the shortlist is **80%**. The shortlist shall consist of not more than three (3) consultants that will garner a score of **80%** or higher.

- Bidders will be rated accordingly as shown in the table below:

CRITERIA	% WEIGHT (a)	RAW SCORE (b)	SCORE (ab)								
A. Firm Credentials (Experience, Expertise and Capability)											
I. Consultant Credentials	<u>80</u>										
1. Be operating for at least ten (10) years in the research business	<u>25</u>										
<table border="1" style="width: 100%;"> <tr> <td>10 years and above</td> <td style="text-align: center;">10</td> </tr> <tr> <td>8-9 years</td> <td style="text-align: center;">8</td> </tr> <tr> <td>6-7 years</td> <td style="text-align: center;">6</td> </tr> <tr> <td>Below 5 years</td> <td style="text-align: center;">4</td> </tr> </table>	10 years and above	10	8-9 years	8	6-7 years	6	Below 5 years	4			
10 years and above	10										
8-9 years	8										
6-7 years	6										
Below 5 years	4										
2. Have engagement similar (shall refer to a customer satisfaction survey) in size and scope with at least two (2) local clients in the last three (3) years, one of which must be a Bank/financial institution using similar toolsets proposed by LANDBANK.	<u>35</u>										
a. Engagement period with at least two (2) local clients, one of which must be a Bank/financial institution	15										
<table border="1" style="width: 100%;"> <tr> <td>In the last 3 years</td> <td style="text-align: center;">10</td> </tr> <tr> <td>Less than 3 years</td> <td style="text-align: center;">4</td> </tr> </table>	In the last 3 years	10	Less than 3 years	4	10						
In the last 3 years	10										
Less than 3 years	4										
b. Engagement similar in size and scope with a local/international bank(s)/financial institution(s)	10										
<table border="1" style="width: 100%;"> <tr> <td>5 or more projects</td> <td style="text-align: center;">10</td> </tr> <tr> <td>4 projects</td> <td style="text-align: center;">8</td> </tr> <tr> <td>3 projects</td> <td style="text-align: center;">6</td> </tr> <tr> <td>2 projects</td> <td style="text-align: center;">4</td> </tr> </table>	5 or more projects	10	4 projects	8	3 projects	6	2 projects	4			
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c. Engagement using similar tool set proposed by LANDBANK.											
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3. Have nationwide telephone survey capability and resources (with capability to capture responses via telephone transmission)	<u>20</u>										
<table border="1" style="width: 100%;"> <tr> <td>As proposed under survey method vis-à-vis LANDBANK target per annual NCSS</td> <td style="text-align: center;">10</td> </tr> <tr> <td>Yes: 10 No: 0</td> <td style="text-align: center;">10</td> </tr> </table>	As proposed under survey method vis-à-vis LANDBANK target per annual NCSS	10	Yes: 10 No: 0	10	10						
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Yes: 10 No: 0	10										

	Capability to capture responses via telephone transmission Yes: 10 No: 0			
II. Personnel Qualifications		<u>20</u>		
1. Overall Project Manager to be assigned is highly qualified to implement the engagement.		5		
<u>Exceeds minimum qualifications</u> More than three (3) years actual experience in research/project management At least one (1) year successful implementation of the project in banking or financial institution.	10			
<u>Meets minimum qualifications</u> At least three (3) years actual experience in research/project management At least one (1) year successful implementation of the project in banking or financial institution.	5			
2. Assistant Project Manager to be assigned are highly qualified to implement the engagement even in the absence of the Project Manager		4		
<u>Exceeds minimum qualifications</u> More than three (3) years actual experience in research/project management At least one (1) year successful implementation of the project in banking or financial institution.	10			

	<p><u>Meets minimum qualifications</u> At least three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p>	5						
3.	<p>Statistician/Quantitative Experts to be assigned are highly qualified to implement the engagement</p> <table border="1" data-bbox="400 629 847 1285"> <tr> <td data-bbox="400 629 847 976"> <p><u>Exceeds minimum qualifications</u> More than three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p> </td> <td data-bbox="847 629 919 976">10</td> </tr> <tr> <td data-bbox="400 976 847 1285"> <p><u>Meets minimum qualifications</u> At least three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p> </td> <td data-bbox="847 976 919 1285">5</td> </tr> </table>	<p><u>Exceeds minimum qualifications</u> More than three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p>	10	<p><u>Meets minimum qualifications</u> At least three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p>	5	3		
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4.	<p>Overall Field Manager to be assigned are highly qualified to implement the engagement</p> <table border="1" data-bbox="400 1391 847 1702"> <tr> <td data-bbox="400 1391 847 1702"> <p><u>Exceeds minimum qualifications</u> More than three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p> </td> <td data-bbox="847 1391 919 1702">10</td> </tr> </table>	<p><u>Exceeds minimum qualifications</u> More than three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p>	10	3				
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	<p><u>Meets minimum qualifications</u> At least three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p>	5			
5.	Overall Data Processing Manager to be assigned are highly qualified to implement the engagement		3		
	<p><u>Exceeds minimum qualifications</u> More than three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p>	10			
	<p><u>Meets minimum qualifications</u> At least three (3) years actual experience in research/project management</p> <p>At least one (1) year successful implementation of the project in banking or financial institution.</p>	5			
6.	Technical Team to be assigned is/are highly qualified to perform the required tasks		2		
	<p><u>Exceeds minimum qualifications</u> More than two (2) years actual experience in research/project management</p>	10			
	<p><u>Meets minimum qualifications</u> At least two (2) years actual experience in research/project management</p>	5			
GRAND TOTAL			100		

Failure to comply with any of the Minimum Required Standards as specified in the Qualification Requirements – Shortlisting Criteria will automatically result to the disqualification of the bidder.

2. Technical Criteria

The technical bid proposal submitted by shortlisted bidders will be rated accordingly as shown in the table below:

CRITERIA	% WEIGHT (a)	RAW SCORE (b)	SCORE (ab)										
A. Implementation Methodology	80												
Bidders' proposed project must clearly discuss the following:													
a. Implementation and project management methodology	30												
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b. Assumptions, Constraints, Dependencies	20												
c. Schedules													
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• Major Milestones	10												
• Delivery Schedule, and	5												
• Project Schedule (major tasks, durations, start and end dates, Gantt chart)	5												
d. Organizational Chart of the Project Team	10												
B. Firm Credentials (Customer Satisfaction Survey Rating and Support Center)	20												

Submit at least three (3) Certificates of Satisfactory Performance for previous successful engagements with Bank/financial institution	10		
Submitted at least three (3) Certificates of Satisfactory Performance for previous successful engagements with Bank/financial institution	10		
Submitted less than two (2) Certificates of Satisfactory Performance for previous successful engagements with Bank/financial institution	0		
Bidder must have or must set up a Support Center or Office within the Philippines preferably in NCR, manned by experienced technical support staff. This shall be stipulated in the contract. Provide proof of location or certification that support center is within the Philippines.	10		
With support center or office within the Philippines preferably in NCR	10		
With support center or office within the Philippines outside NCR	5		
Without support center	0		
GRAND TOTAL	100		

The minimum required score be included in the technical criteria is **80%**.

J. Bid Evaluation

- a. Bid Evaluation Procedure – Quality-Cost Based Evaluation (QCBE)/Selection (per RA 9184)
- b. Overall Bid Evaluation Criteria and Rating System

	% Weight (a)	Raw Score (b)	Score (ab)	Remarks
1. Technical Criteria (Implementation Methodology, Firm Credential-Customer Satisfaction Survey Rating and Support Center)	80			

<p>2. Financial Criteria</p> <p>The proposed bid price of participating bidder:</p> <table border="1" data-bbox="405 315 879 667"> <thead> <tr> <th>Condition</th> <th>Raw Score</th> </tr> </thead> <tbody> <tr> <td>Lowest Bid</td> <td>100%</td> </tr> <tr> <td>Other Bids</td> <td>BS</td> </tr> </tbody> </table> <p style="text-align: center;">$BS = 100 * BL/B$</p> <p>Where: BS – Score of bids under consideration BL – Price of lowest bid B – Price of bid under Consideration</p>	Condition	Raw Score	Lowest Bid	100%	Other Bids	BS	20			
Condition	Raw Score									
Lowest Bid	100%									
Other Bids	BS									
GRAND TOTAL	100									

K. Other Terms and Conditions

1. Proposal Preparation

To be eligible for consideration, the Third-Party Consultant/Consulting Firm must meet the intent of all mandatory requirements. Compliance with the intent of all the requirements shall be determined by LANDBANK in accordance with Section C onwards of this TOR.

For the financial portion of the proposal, it must utilize the format found in Section F (Payment Milestones), which will serve as the basis for evaluating its price quotation. It should include additional information as necessary to explain in detail its price quotation.

2. Proposal Submission

Only electronic bids that are successfully uploaded to the Secure File Transfer Facility (SFTF) of LANDBANK on or before the deadline shall be accepted. Submission of physical bid (hard copy) shall not be accepted. The prescribed procedures in the submission and opening of electronic bids are stated in the Detailed Procedures in Submission and Opening of Electronic Bids (Annexes C-1 to C-8 of the Bidding Documents). Late bids shall not be accepted.

In all other matters relating to the procurement of the services specified in this TOR, the provisions of R.A. 9184 shall be observed.

3. Compliance with Laws, Policies, Processes, Regulations and Standards

The Third-Party Consultant/Consulting Firm must fully comply with the pertinent provisions of the Data Privacy Act and all applicable national or

local laws and executive orders in the performance of work under this contract.

4. Contract Contents

This TOR and any addenda, Third-Party Consultant/Consulting Firm responses including amendments, best and final offers, negotiations shall be included in resulting contract if any. Section H hereof enumerates the minimum required information and documents which the Third-Party Consultant/Consulting Firm must submit as part of its proposal for engagement. This TOR and any addenda thereto, responses of the Third-Party Consultant/Consulting Firm and any amendments thereto, and any best and final offers or negotiations most favorable for the successful implementation of the project shall be considered in the contract between LANDBANK and the Third-Party Consultant/ Consulting Firm.

TPF 2. CONSULTANT'S REFERENCES

Relevant Services Carried Out in the Last Ten (10) Years That Best Illustrate Qualifications

Using the format below, provide information on each project for which your firm/entity, either individually, as a corporate entity, or as one of the major companies within an association, was legally contracted.

Project Name:		Country:
Location within Country:		Professional Staff Provided by Your Firm/Entity(profiles):
Name of Client:		No. of Staff:
Address:		No. of Staff-Months; Duration of Project:
Start Date (Month/Year):	Completion Date (Month/Year):	Approx. Value of Services (in Current Php):
Name of Associated Consultants, if any:		No. of Months of Professional Staff Provided by Associated Consultants:
Name of Senior Staff (Project Director/Coordinator, Team Leader) Involved and Functions Performed:		
Narrative Description of Project:		
Description of Actual Services Provided by Your Staff:		

Consultant's Name: _____

The following documents shall be submitted in support of the compliance of the Bid to the TPF 2:

- a. **Executive Summary/Brief Company Profile**
- b. Exchange of Confidential Information and Other Agreements

Non-submission of the above mentioned document/requirement may result in bidder's post disqualification.

FPF 2. SUMMARY OF COSTS

Costs	Currency(ies) ¹	Amount in Philippine Peso
Sub Total		Php _____ _____
Local Taxes		_____
Total Amount of Financial Proposal		Php _____

*Bidder can re-format the tables, provided, all the required information are consistent with the original form.

The following document shall be submitted in support of the compliance of the Bid to the FPF 2:

- **Cost Breakdown Sheet based on Section F of the revised Terms of Reference**
- **Payment Milestones Sheet based on Section F of the revised Terms of Reference**

¹ In cases of contracts involving foreign consultants, indicate the exchange rate used.

Checklist of Bidding Documents for Procurement of Consulting Services

Technical Proposal (PDF File)

The Technical Proposal shall contain documents sequentially arranged as follows (may include other documents as stated in the Bidding Documents):

1. Duly notarized Secretary's Certificate attesting that the signatory is the duly authorized representative of the prospective bidder, and granted full power and authority to do, execute and perform any and all acts necessary and/or to represent the prospective bidder in the bidding, if the prospective bidder is a corporation, partnership, cooperative, or joint venture (see sample form - Form No. 3).
2. TPF 1 – Technical Proposal Submission Form
3. **Revised TPF 2 – Experience of the Firm/Consultant References**
 - 3.1 **Executive Summary/Brief Company Profile**
 - 3.2 Exchange of Confidential Information and Other Agreements
4. TPF 3 – Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be Provided by the Procuring Entity
5. TPF 4 – Description of the Methodology and Work Plan for Performing the Project
 - 5.1 Salient Features of Proposed Methodology
 - 5.2 Detailed, Point-by-Point Response to Project Objectives and Deliverables
 - 5.3 Draft Contract
 - 5.4 Scope of Service
 - 5.5 Deliverable Items Summary
 - 5.6 Assumption, Constraints and Dependencies
 - 5.7 Schedules
 - 5.8 Analyst reports, articles, brochures, white papers and other relevant materials
6. TPF 5 – Team Composition and Task
 - 6.1 List of Projects and Project Team Information with Certificate of Satisfactory Performance
7. TPF 6 – Format of Curriculum Vitae (CV) for Proposed Professional Staff
8. TPF 7 – Time Schedule for Professional Personnel
9. TPF 8 – Activity (Work) Schedule
10. Form No. 6 – Deliverable Items Summary

11. Bid Security (if in the form of a Surety Bond, submit also a certification issued by the Insurance Commission).
 12. Duly notarized Omnibus Sworn Statement (OSS) (sample form - Form No.2).
- **Post-Qualification Documents – [The bidder may submit the following documents/requirements within five (5) calendar days after receipt of Notice of Post-Qualification]:**
1. Business Tax Returns per Revenue Regulations 3-2005 (BIR No. 2550 Q) VAT or Percentage Tax Returns for the last two (2) quarters filed manually or through EFPS.
 2. Latest Income Tax Return filed manually or through EFPS.
 3. Original copy of Bid Security (if in the form of a Surety Bond, submit also a certification issued by the Insurance Commission).
 4. Original copy of duly notarized Omnibus Sworn Statement (OSS) (sample form - Form No.2).
 5. Duly notarized Secretary's Certificate designating the authorized signatory in the Contract Agreement if the same is other than the bidder's authorized signatory in the bidding.

Financial Proposal (PDF File)

The Financial Component shall contain documents sequentially arranged as follows:

1. FPF 1 – Financial Proposal Submission Form
2. **Revised FPF 2 – Summary of Costs**
 - 2.1 **Cost Breakdown Sheet based on Section F of the revised Terms of Reference**
 - 2.2 **Payment Milestones Sheet based on Section F of the revised Terms of Reference**
3. FPF 3 – Breakdown of Price per Activity
4. FPF 4 – Breakdown of Remuneration per Activity
5. FPF 5 – Travel Expenses, Office Rent, Accommodation and Clerical Assistance per Activity per Activity
6. FPF 6 – Miscellaneous Expenses

“The forms attached to the Bidding Documents may be reproduced or reformatted provided the information required in the original forms and other requirements like signatures, if applicable, are complied with in the submittal.”