

**UPDATED STATUS OF
ACCOMPLISHMENTS**

vis-à-vis

**GCG PERFORMANCE
SCORECARD**

(January to September 2022)

**STATUS OF SHFC ACCOMPLISHMENT BASED ON THE
GCG PERFORMANCE SCORECARD
(January to September 2022)**

Performance Indicator	Weight	2022 Target	Actual Accomplishment	Accomplishment Rate	GCG Weighted Rating
SOCIAL IMPACT					
SM 1: Increase Number of ISFs Provided with Housing Finance Assistance	35%	60,000 number of ISFs provided with housing finance assistance	6,095 ISFs provided with housing finance assistance	10.16%	3.56%
Sub-Total	35%				3.56%
STAKEHOLDERS					
SM 2a: Percentage of Satisfied Customers (Pre-Takeout)	5%	90% of the Respondents gave a Satisfactory Rating	People Dynamics Inc. (PDI) commenced with project implementation and submitted Inception Report and Survey Instrument to be utilized for the said project	0.00%	0.00%
SM 2b: Percentage of Satisfied Customers (Post-Takeout)	5%	90% of the Respondents gave a Satisfactory Rating		0.00%	0.00%
Sub-Total	10%				0.00%

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Performance Indicator	Weight	2022 Target	Actual Accomplishment	Accomplishment Rate	GCG Weighted Rating
FINANCE					
SM 3: Improve Collection Efficiency Rate	10%	91% CER on Current and Delinquent Accounts	91.81% CER	100%	10.00%
SM 4: Improve Status of Problematic Accounts	5%	10% Reduction of Problematic Accounts	3.06% increase in problematic accounts	0.00%	0.00%
SM 5: Increase Gross Revenue	5%	Php1.147 Billion Total Revenues	Php465 Million Gross Revenue	40.60%	2.03%
SM 6a: Obligations BUR	5%	90%	33%	36.67%	1.83%
SM 6b: Disbursements BUR (vis-à-vis Total Obligations)	5%	90%	82%	91.11%	4.56%
SM 6c: Disbursements BUR (vis-à-vis DBM-Approved COB)	5%	90%	27%	30%	1.50%
Sub-Total	35%				19.92%
INTERNAL PROCESS					
SM 7: Percentage of Loan Applications Processed Within Prescribed Period	5%	100% Loan Applications Processed Within Prescribed Time	-	-	0.00%
SM 8: Enhance Support Systems for Effective and Efficient Processes	5%	100% Implementation of Targets under the ISSP as submitted to the DICT	80% completion of two (2) systems: (1) Performance Monitoring System (PMS) (2) Incident Handling System (IHS) 50% completion of two (2) systems: (1) Human	65%	3.25%

Performance Indicator	Weight	2022 Target	Actual Accomplishment	Accomplishment Rate	GCG Weighted Rating
			Resource Information System (HRIS) (2) Remedial Management System (RMS)		
Sub-Total	10%				3.25%
ORGANIZATION					
SM 9: Attain Quality Management Certification	5%	Pass ISO Surveillance Audit (Head Office and 1 Regional Office) ISO Certification for two (2) Regional Branches	-	-	0.00%
SM 10: Improvement of the Competency of the Organization	5%	Improvement in the Competency Baseline of the Organization	Competency Baseline will be computed at the end of 2022.	-	0.00%
Sub-Total	10%				0.00%
TOTAL	100%				26.73%

Prepared by:


MR. FLORENCIO R. CARANDANG, JR.
 OIC-VP, Corporate Planning and Communications Group

Audited by:


MS. LOURDES P. PANALIGAN
 OIC-VP, Internal Audit Department

SOCIAL HOUSING FINANCE CORPORATION

	Component					Annual Target	3rd Quarter	
	Strategic Objective (SO)/ Strategic Measure(SM)		Formula	Weight	Rating System		Target	Actual
SOCIAL IMPACT	SO 1	Improve the Quality of Life of the Informal Settler Families and Low-Income Filipinos through the Provision of Housing Finance						
	SM 1	Increase the Number of ISFs Provided with Housing Assistance	Actual Accomplishment	35%	(Actual/Target) x Weight	60,000 ISFs provided with housing loans and grants	60,000 ISFs provided with housing loans and grants	6,095 ISFs provided with housing loans and grants
	Sub-total			35%				
STAKEHOLDERS	SO 2	Ensure Customer Satisfaction through the Provision of Quality Service						
	SM 2a	Percentage of Satisfied Customers (Pre-Takeout)	Number of stakeholders who gave a rating of at least Satisfactory/Total number of respondents	5%	(Actual/Target) x Weight If less than 80% = 0%	90% of respondents gave a satisfactory rating	90% of respondents gave a satisfactory rating	People Dynamics Inc. (PDI) commenced with project implementation and submitted Inception Report and Survey Instrument to be utilized for the said project
	SM 2b	Percentage of Satisfied Customers (Post-Takeout)	Number of stakeholders who gave a rating of at least Satisfactory/Total number of respondents	5%	(Actual/Target) x Weight If less than 80% = 0%	90% of respondents gave a satisfactory rating	90% of respondents gave a satisfactory rating	
	Sub-total			10%				
FINANCE	SO 3	Enhance Financial Viability						
	SM 3	Improve Collection Efficiency Rate	Cumulative Collections/Cumulative Billings (Current and Delinquent Accounts Only)	10%	(Actual/Target) x Weight	91% Collection Efficiency on Current and Delinquent Accounts	91% Collection Efficiency on Current and Delinquent Accounts	91.81% CER

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	Component					Annual Target	3rd Quarter	
	Strategic Objective (SO)/ Strategic Measure(SM)		Formula	Weight	Rating System		Target	Actual
	SM 4	Improve Status of Problematic Accounts	[(Current Year's Number of Problematic Account – Prior Year's Number of Problematic Account)/Prior Year's Number of Problematic Accounts] x 100%	5%	(Actual/Target) x Weight	10% Reduction of Problematic Accounts	10% Reduction of Problematic Accounts	3.06% increase in problematic accounts
	SM 5	Increase Gross Revenues	Total Revenues	5%	(Actual/Target) x Weight	₱1,147 Million Net Operating Income	₱1,147 Million Net Operating Income	₱ 465 Million Net Operating Income
	SM 6	Budget Utilization Rate (BUR)						
	SM 6a	Obligations BUR	Total Obligations/DBM-Approved or Board-Approved Corporate Operating Budget <i>(both net of PS Cost)</i>	5%	(Actual/Target) x Weight	90%	90%	33%
	SM 6b	Disbursements BUR	Total Disbursement/Total Obligations <i>(both net of PS)</i>	5%	(Actual/Target) x Weight	90%	90%	82%
	SM 6c		Total Disbursement/DBM-Approved COB <i>(both net of PS)</i>	5%	(Actual/Target) x Weight	90%	90%	27%
	Sub-total				35%			

	Component					Annual Target	3rd Quarter	
	Strategic Objective (SO)/ Strategic Measure (SM)		Formula	Weight	Rating System		Target	Actual
INTERNAL PROCESS	SO 4	Enhance Internal Process						
	SM 7	Percentage of Loan Application Processed within the Prescribed Period	Total Number of Loan Applications Processed with Prescribed Period ¹ /Total Number of Loan Applications Received	5%	(Actual/Target) x Weight	100%	100%	-
	SM 8	Enhance Support Systems for Effective and Efficient Process	Number of Deliverables Accomplished/Total Number of Deliverables	5%	(Actual/Target) x Weight	100% Implementation of Targets under the ISSP as submitted to the DICT	100% Implementation of Targets under the ISSP as submitted to the DICT	80% completion of two (2) systems: (1) Performance Monitoring System (PMS) (2) Incident Handling System (IHS) 50% completion of two (2) systems: (1) Human Resource Information System (HRIS) (2) Remedial Management System (RMS)
	Sub-total			10%				
ORGANIZATION	SO 5	Implement Quality Management System						
	SM 9	Attain Quality Management Certification	Actual Accomplishment	5%	(Actual/Target) x Weight	Pass ISO Surveillance Audit (Head Office and 1 Regional Office) ISO Certification for 2 Regional Branches	Pass ISO Surveillance Audit (Head Office and 1 Regional Office) ISO Certification for 2 Regional Branches	-

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¹ The prescribed period for the processing of loan application shall be based on SHFC's compliance with Republic Act No. 11032 as reflected in SHFC's Citizen's Charter.

		Component				Annual Target	3rd Quarter	
		Strategic Objective (SO)/ Strategic Measure (SM)	Formula	Weight	Rating System		Target	Actual
	SO 6	Enhance Corporate Competency						
	SM 10	Improvement of the Competency of the Organization	Competency Baseline ² 2022 – Competency Baseline 2021	5%	All or Nothing	Improvement in the Competency Baseline of the Organization	Improvement in the Competency Baseline of the Organization	Competency Baseline will be computed by the end of 2022.
	Sub-total			10%				
	TOTAL			100%				

Prepared by:


MR. FLORENCIO R. CARANDANG, JR.
OIC-VP, Corporate Planning and Communications Group

Audited by:


MS. LOURDES P. PANALIGAN
OIC-VP, Internal Audit Department

STRATEGIC MEASURE 1:
Increase Number of ISFs
Provided with Housing Finance
Assistance

Signed Supporting Document

COMMUNITY-DRIVEN SHELTER FINANCING PROGRAMS

Accomplishment Report

For the period January - September 2022

Table 1. Takeout Performance in terms of ISFs who benefitted from SHFC programs, by project

COMMUNITY-DRIVEN SHELTER FINANCING PROGRAM	NO. OF PROJECTS	NO. OF INFORMAL SETTLER FAMILIES (ISFs) ASSISTED	LOANS RELEASED, PhP
Community Mortgage Program	14	2,235	1,071,738,274.58
<i>Phase 1</i>	<i>14</i>	<i>2,235</i>	<i>212,371,377.87</i>
<i>Phase 2</i>	-	-	<i>94,249,654.89*</i>
<i>Phase 3</i>	-	-	<i>765,117,241.82*</i>
High Density Housing Program	2	1,334	158,469,619.11
<i>Phase 1</i>	<i>2</i>	<i>1,334</i>	<i>86,718,002.00</i>
<i>Refinancing</i>	-	-	<i>0.00</i>
<i>Phase 2 and 3</i>	-	-	<i>71,751,617.11*</i>
Marawi Shelter Project	-	-	113,805,192.10
<i>Phase 1</i>	-	-	<i>0.00</i>
<i>Phase 2</i>	-	-	<i>113,805,192.10*</i>
DOTr Project	1	982	59,363,716.10
<i>Phase 1</i>	<i>1</i>	<i>982</i>	<i>59,363,716.10</i>
<i>Phase 2</i>	-	-	<i>0.00</i>
<i>Phase 3</i>	-	-	<i>0.00</i>
TOTAL	17	4,551	1,403,376,801.89

**Number of projects and ISFs were previously counted.*


Table 2. Takeout Performance in terms of ISFs who benefitted from SHFC programs, by loan type

COMMUNITY-DRIVEN SHELTER FINANCING PROGRAM	NO. OF PROJECTS	NO. OF INFORMAL SETTLER FAMILIES (ISFs) ASSISTED	LOANS RELEASED, PhP
Community Mortgage Program	21	3,779	1,071,738,274.58
Phase 1	12	2,235	212,371,377.87
Phase 2	5	835	94,249,654.89*
Phase 3	4	709	765,117,241.82*
High Density Housing Program	2	1,334	158,469,619.11
Phase 1	2	1,334	86,718,002.00
Refinancing	-	-	0.00
Phase 2 and 3	-	-	71,751,617.11*
Marawi Shelter Project	-	-	113,805,192.10
Phase 1	-	-	0.00
Phase 2	-	-	113,805,192.10*
DOTr Project	1	982	59,363,716.10
Phase 1	1	982	59,363,716.10
Phase 2	-	-	0.00
Phase 3	-	-	0.00
TOTAL	24	6,095	1,403,376,801.89

*ISF communities may have availed SHFC's shelter financing programs through the following different loan types:

- 1) Phase 1 – availment of land acquisition loan
- 2) Phase 2 – availment of site development loan
- 3) Phase 3 – availment of house construction loan
- 4) Phase 2 and 3 for High Density Housing Program includes site development and house construction loan

Prepared by:


Wyndee Grace R. Peña
Project Development Officer,
OSVP for Operations Group

Noted by:


Atty. Ronaldo B. Saco
OIC-Senior Vice President,
Operations Group



SOCIAL HOUSING FINANCE CORPORATION
Kaagapay ng Komunidad sa Maginhawang Pamumuhay

CMP TAKEN-OUT PROJECTS
January-September 2022



A. LOT ACQUISITION

NO.	REGION	PROJECT CLASSIF.	PROJECT NAME	LOCATION	CMP-MOBILIZER	NO. OF (ISFs) ASSISTED	BOARD APPROVAL DATE	LOT ACQUL TOD	LOT ACQUL LOAN AMOUNT (P)	CITY/ MUNICIPALITY	PROVINCE
2022											
1	VI	off-site	Hope Village HOAI Phase I	Brgy. San Fernando Talisay City, Negros Occidental	SHFC In-House	193	10/13/2021	01/17/2022	22,181,000.00	TALISAY CITY	NEGROS OCCIDENTAL
2	NCR	on-site	Bisig ng Pagkakaisa HOAI Phase II-A	Everlasting St. Brgy. Payatas, Quezon City	Welfare for the Community Foundation Inc.	100	09/18/2019	01/24/2022	9,553,559.05	QUEZON CITY	NCR
3	XII	on-site	SAMAKA HOAI	Barrio of Matampay, Cotabato City	LGU-Cotabato City	136	11/26/2020	02/02/2022	3,787,900.00	COTABATO CITY	COTABATO CITY
4	VI	on-site	Villarruz Village HOAI Phase I	Brgy. Gabuan, Roxas City, Capiz	People's Home Organization, Inc.	92	10/30/2019	02/10/2022	9,191,422.33	CAPIZ	ILOILO
5	III	on-site	Marcos District HOAI	Marcos District, Talavera, Nueva Ecija	Tulong at Silungan ng Masa Foundation, Inc.	79	08/14/2019	03/23/2022	6,609,200.00	TALavera	NUEVA ECIJA
6	XII	LGU CMP	Mountain-Ao HOAI	Polomolok, South Cotabato	SOCEM Shelter Development Inc.	253	04/16/2019	03/24/2022	18,208,948.62	POLOMOLOK	SOUTH COTABATO
7	VI	on-site	Dinsay Village HOAI	Brgy. Camugao, Kabankalan City, Negros Occidental	People's Home Organization Inc	57	09/02/2019	03/24/2022	4,176,885.30	KABANKALAN CITY	NEGROS OCCIDENTAL
8	IX	off-site	Obay Heights HOAI	Brgy. Obay, Mun. of Polanco, Zamboanga del Norte	In-House	236	10/13/2021	03/24/2022	30,102,000.00	POLANCO	ZAMBOANGA DEL NORTE
9	XI	LGU CMP	Biyaya HOAI	Davao City	LGU-Davao City	298	12/14/2021	03/24/2022	40,278,294.20	DAVAO CITY	DAVAO DEL SUR
10	VI	on-site	Jalandoni HOAI	Poblacion Delgado, Calinog, Iloilo	Roxas City Urban Poor Federation, Inc.	76	12/01/2017	03/24/2022	6,781,235.53	CALINOG	ILOILO
11	III	Turnkey CMP	Townhomes San Fernando HOAI (Pilot Phase)	San Fernando, Pampanga	LGU-San Fernando	200	11/10/2021	03/24/2022	19,000,000.00	SAN FERNANDO	PAMPANGA
12	III	Turnkey CMP	Townhomes San Fernando HOAI (Batch 2)	San Fernando, Pampanga	LGU-San Fernando	300	6/28/2022	06/08/2022	28,500,000.00	SAN FERNANDO	PAMPANGA
13	II	on-site	Maganda Dwellers CMP HOAI	San Mateo, Isabela	Phil-Gemm Alleviation Foundation Inc.	64	12/4/2022	09/12/2022	4,862,032.84	SAN MATEO	ISABELA
14	VI	on-site	Sum-aganon Nagahandum Makabalay HOAI	Brgy. Tabuanan, Bago City	Tulong at Silungan ng Masa Foundation, Inc.	151	7/1/2020	09/19/2022	9,862,900.00	BAGO CITY	NEGROS OCCIDENTAL
14	TOTAL (A) LOT ACQUISITION					2,235			213,095,377.87		

B. SITE DEVELOPMENT

NO.	REGION	PROJECT CLASSIF.	PROJECT NAME	LOCATION	CMP-MOBILIZER	NO. OF (ISFs) ASSISTED	BOARD APPROVAL DATE	SITE DEV. TOD	SITE DEV LOAN AMOUNT (P)	CITY/ MUNICIPALITY	PROVINCE
2022											
	III	LGU CMP (Assisted)	Apawan HOAI Phase III (2nd Billing)	Brgy. Loma de Gato, Marilao, Bulacan	Makawili JayC Foundation, Inc.		03/04/2019	01/24/2022	1,226,780.31	MARILAO	BULACAN
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase II (2nd Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		05/07/2004	02/02/2022	1,079,434.94	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	IV-A	LGU CMP (Assisted) off-site	San Antonio Ville HOAI (8th Tranche)	Brgy. San Jose, San Antonio, Quezon	United Home Development Foundation, Inc.		08/16/2019	02/16/2022	8,006,973.21	SAN ANTONIO	QUEZON
	X	LGU CMP (Assisted) off-site	Blessed Ville HOAI (Final Tranche)	Brgy. Indahag, Cagayan de Oro City	LGU-Cagayan		10/31/2013	03/16/2022	1,110,696.18	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	IV-A	LGU CMP (Assisted) off-site	San Antonio Ville HOAI (9th Tranche)	Brgy. San Jose, San Antonio, Quezon	United Home Development Foundation, Inc.		08/16/2019	03/18/2022	17,803,958.17	SAN ANTONIO	QUEZON
	IX	on-site	San Antonio Fisherfolks Homeowners Association, Inc (3rd Tranche)	Brgy. Taga, Katipunan, Zamboanga del Norte	KP Zanorte BALAI		09/23/2019	03/18/2022	2,755,957.72	KATIPUNAN	ZAMBOANGA DEL NORTE
1	III	Turnkey CMP	Townhomes San Fernando HOAI	San Fernando, Pampanga	LGU - San Fernando	200	11/10/2021	03/24/2022	17,000,000.00	SAN FERNANDO	PAMPANGA
2	III	Turnkey CMP	Townhomes San Fernando HOAI (2nd Initial Release of Pilot Phase)	San Fernando, Pampanga	LGU- San Fernando	200	10/11/2021	03/24/2022	17,000,000.00	SAN FERNANDO	PAMPANGA
	IV-A	LGU CMP (Assisted) off-site	San Antonio Ville HOAI (10th Tranche)	Brgy. San Jose, San Antonio, Quezon	United Home Development Foundation, Inc.		08/16/2019	06/02/2022	9,358,214.76	SAN ANTONIO	QUEZON
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase I (3rd Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		05/07/2004	06/13/2022	146,665.40	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	VIII		Villa de Tacloban HOAI	Tacloban, Leyte	LGU-Tacloban		10/8/2018	07/11/2022	3,275,316.08	TACLOBAN	LEYTE
	III	LGU CMP (Assisted)	Apawan HOAI Phase III (3rd Billing)	Brgy. Loma de Gato, Marilao, Bulacan	Makawili JayC Foundation, Inc.		03/04/2019	09/09/2022	3,245,639.53	MARILAO	BULACAN
	III	LGU CMP	Coronado Ville Homeowners Association, Inc.Phase 1. - (5th Billing)	Brgy. Camias, Magalang, Pampanga	LGU-Pampanga		07/30/2018	09/09/2022	2,580,494.62	MAGALANG	PAMPANGA
3	IV-B	LGU CMP	Upright Community HOAI	Brgy. Mayao Crossing, Lucena City, Quezon	LGU- Lucena City	209	6/1/2022	09/12/2022		LUCENA CITY	QUEZON
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase I (4th Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		05/07/2004	09/12/2022	544,745.70	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase II (3rd Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		05/07/2004	09/12/2022	52,486.80	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
4	II		Sunland CMP Villas 1 HOAI	Brgy. Sagana, Santiago City, Isabela	LGU-Sagana	126	12/11/2019	09/12/2022		ISABELA	ISABELA
5	III	Turnkey CMP	Townhomes San Fernando HOAI (100 Units)	San Fernando, Pampanga	LGU- San Fernando	100	11/10/2021	09/20/2022	8,500,000.00	SAN FERNANDO	PAMPANGA
	III	LGU CMP	Coronado Ville Homeowners Association, Inc.Phase 1 (6th Billing)	Brgy. Camias, Magalang, Pampanga	LGU-Pampanga		07/30/2018	09/20/2022	562,291.47	MAGALANG	PAMPANGA
5	TOTAL (B) SITE DEVELOPMENT					835			94,249,654.89		

C. HOUSE CONSTRUCTION

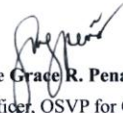
NO.	REGION	PROJECT CLASSIF.	PROJECT NAME	LOCATION	CMP-MOBILIZER	NO. OF (ISFs) ASSISTED	BOARD APPROVAL DATE	HOUSE CON. TOD	HOUSE CON. LOAN AMOUNT (P)	CITY/ MUNICIPALITY	PROVINCE
2022											
	III	LGU CMP (Assisted)	Apawan HOAI Phase III (2nd Billing)	Brgy. Loma de Gato, Marilao, Bulacan	Makawili JayC Foundation, Inc.		03/04/2019	01/24/2022	5,565,696.93	MARILAO	BULACAN
	X	LGU CMP	Balubal Heights HOAI (3rd Billing)	Brgy. Balubal, Cagayan de Oro City	City Government of Cagayan de Oro		10/01/2020	01/19/2022	36,094,905.63	BALUBAL	CAGAYAN DE ORO
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase II (2nd Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		09/04/2012	02/02/2022	4,829,583.10	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	IV-A	LGU CMP (Assisted) off-site	San Antonio Ville HOAI (8th Tranche)	Brgy. San Jose, San Antonio, Quezon	United Home Development Foundation, Inc.		08/16/2019	02/16/2022	18,315,264.57	SAN ANTONIO	QUEZON
	IV-A	CMP Vertical	DVV2 Building 3 HOAI (1st Tranche)	Brgy. Marketview, Lucena City, Quezon	LGU Lucena City, Quezon		3/4/2019	02/17/2022	12,842,160.74	LUCENA CITY	QUEZON
	X	LGU CMP (Assisted) off-site	Blessed Ville HOAI (Final Tranche)	Brgy. Indahag, Cagayan de Oro City	LGU-Cagayan		10/31/2013	03/16/2022	4,211,711.68	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	IV-A	Resettlement CMP- Vertical	Ciudad de Strike Homeowners Association - Bldgs. 11- 20 (5th Drawdown Billing)	Molino Road, Molino I, Bacoar City, Cavite	Isabela Faithful Servants Foundation Inc.		10/23/2019	03/10/2022	28,084,259.97	BACOR	CAVITE
	NCR	on-site	Villa Umami Homeowners Association, Inc. (5th Tranche)	Matimyas St., Brgy. 527, Zone 52, Sampaloc, Manila	Center for Housing Innovations & Component Services, Inc. (CHOICES)		10/23/2019	03/18/2022	1,725,165.34	SAMPALOC, MANILA	NCR
	IX	on-site	San Antonio Fisherfolks Homeowners Association, Inc (3rd Tranche)	Brgy. Taga, Katipunan, Zamboanga del Norte	KP Zanorte BALAI		09/23/2019	03/18/2022	6,890,062.10	KATIPUNAN	ZAMBOANGA DEL NORTE
	IV-A	LGU CMP (Assisted) off-site	San Antonio Ville HOAI (9th Tranche)	Brgy. San Jose, San Antonio, Quezon	United Home Development Foundation, Inc.		08/16/2019	03/18/2022	24,177,273.26	SAN ANTONIO	QUEZON
	X	LGU CMP	Balubal Heights HOAI (4th Billing)	Brgy. Balubal, Cagayan de Oro City	City Government of Cagayan de Oro		10/01/2020	03/18/2022	57,636,724.18	BALUBAL	CAGAYAN DE ORO
	IV-A	CMP Vertical	DVV2 Buildings 1-5 HOAI (1st Tranche)	Brgy. Marketview, Lucena City, Quezon	LGU Lucena City, Quezon		3/4/2019	03/23/2022	62,449,827.95	LUCENA CITY	QUEZON
1	III	Turnkey CMP	Townhomes San Fernando HOAI	San Fernando, Pampanga	LGU- San Fernando	200	11/10/2021	03/24/2022	112,300,000.00	SAN FERNANDO	PAMPANGA
	IV-A	LGU CMP (Assisted) off-site	San Antonio Ville HOAI (10th Tranche)	Brgy. San Jose, San Antonio, Quezon	United Home Development Foundation, Inc.		08/16/2019	06/02/2022	23,381,326.61	SAN ANTONIO	QUEZON
	X	LGU CMP	Balubal Heights HOAI (5th Billing)	Brgy. Balubal, Cagayan de Oro City	City Government of Cagayan de Oro		10/01/2020	06/02/2022	56,005,039.64	BALUBAL	CAGAYAN DE ORO
	X		Mergeville HOAI Batch 2 (6th Tranche)	Brgy. Indahag, Cagayan de Oro City	LGU - Cagayan de Oro		10/4/2017	06/08/2022	2,209,322.62	INDAHAG	CAGAYAN DE ORO
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase I (3rd Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		05/07/2004	06/13/2022	2,563,325.75	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
2	III	Turnkey CMP	Townhomes San Fernando HOAI (2nd Release of Pilot Phase)	San Fernando, Pampanga	LGU- San Fernando	200	06/28/2021	06/08/2022	112,300,000.00	SAN FERNANDO	PAMPANGA
	III	LGU CMP (Assisted)	Apawan HOAI Phase III (3rd Billing)	Brgy. Loma de Gato, Marilao, Bulacan	Makawili JayC Foundation, Inc.		03/04/2019	09/09/2022	11,204,775.05	MARILAO	BULACAN
	X	LGU CMP	Balubal Heights HOAI (6th Billing)	Brgy. Balubal, Cagayan de Oro City	City Government of Cagayan de Oro		10/01/2020	09/09/2022	54,920,676.51	BALUBAL	CAGAYAN DE ORO
	IV-A	CMP Vertical	DVV2 Buildings 1-5 HOAI (2nd Tranche)	Brgy. Marketview, Lucena City, Quezon	LGU Lucena City, Quezon		3/4/2019	09/09/2022	23,418,631.45	LUCENA CITY	QUEZON

	III	LGU CMP	Coronado Ville Homeowners Association, Inc. Phase 1. - (5th Billing)	Brgy. Camias, Magalang, Pampanga	LGU-Pampanga		07/30/2018	09/09/2022	20,225,375.62	MAGALANG	PAMPANGA
3	IV-B	LGU CMP	Upright Community HOAI	Brgy. Mayao Crossing, Lucena City, Quezon	LGU- Lucena City	209	6/1/2022	09/12/2022		LUCENA CITY	QUEZON
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase I (4th Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		05/07/2004	09/12/2022	3,959,426.97	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	X	off-site (express lane)	Medalla Milagrosa HOAI Phase II (3rd Tranche)	Brgy. Balubal, Cagayan De Oro City	City Government of Cagayan de Oro		05/07/2004	09/12/2022	2,497,871.16	CAGAYAN DE ORO CITY	MISAMIS ORIENTAL
	X		Mergeville HOAI Batch 2 (7th Tranche)	Cagayan de Oro City	LGU-CDO		04/10/2017	09/12/2022	3,670,408.26	CAGAYAN DE ORO CITY	CAGAYAN DE ORO CITY
4	III	Turnkey CMP	Townhomes San Fernando HOAI (100 Units)	San Fernando, Pampanga	LGU- San Fernando	100	11/10/2021	09/20/2022	56,150,000.00	SAN FERNANDO	PAMPANGA
	III	LGU CMP	Coronado Ville Homeowners Association, Inc. Phase 1 (6th Billing)	Brgy. Camias, Magalang, Pampanga	LGU-Pampanga		07/30/2018	09/20/2022	17,488,426.73	MAGALANG	PAMPANGA
4	TOTAL (C) HOUSE CONSTRUCTION					709			765,117,241.82		


D. LOAN ASSISTANCE

NO.	REGION	PROJECT CLASSIF.	PROJECT NAME	LOCATION	CMP-MOBILIZER	NO. OF (ISFs) ASSISTED	LOT ACQUI. TOD	LOAN ASSIST. TOD	LOAN ASSIST. AMOUNT (P)	CITY/ MUNICIPALITY	PROVINCE
2021											
0	TOTAL (D) LOAN ASSISTANCE					0			0.00		
23	GRAND TOTAL (A + B + C + D)					3,779			1,072,462,274.58		

Prepared by:


Wyndee Grace R. Pena
 Project Development Officer, OSVP for Operations Group

Noted by:


Atty. Ronaldo B. Saco
 OIC-Senior Vice President, OSVP for Operations Group



Kaagapay ng Komunidad sa Maginhawang Pamumuhay



SM 1: Utilization of Housing Subsidies for the Provision of Shelter Security and Improved Housing Quality

High Density Housing

January-September 2022

A. LOT ACQUISITION (Phase 1)

NO.	REGION	TYPE OF PROJECT	BOARD APPROVAL DATE	PROJECT NAME	RELOCATION SITE	CSO PARTNER	NO. OF INFORMAL SETTLER FAMILIES (ISFs) FROM WATERWAYS/ DANGER AREAS ASSISTED	PHASE 1 AMOUNT RELEASED, PHP	PHASE 1 TAKE OUT DATE
1	IV-A	Near-City	12/2/2015	Gulayan Pilapil HOAI	Tanza, Cavite		440	22,054,305.00	06/03/2022
2	IV-A	In-City	11/6/2018	Kamaynila HOAI	Tanza, Cavite		894	64,663,697.00	06/03/2022
2	Sub-total (Phase 1)						1,334	86,718,002.00	

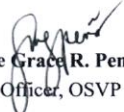
B. SITE DEVELOPMENT & BUILDING CONSTRUCTION (Phase 2)

NO.	REGION	TYPE OF PROJECT	BOARD APPROVAL DATE	PROJECT NAME	RELOCATION SITE	CSO PARTNER	NO. OF INFORMAL SETTLER FAMILIES (ISFs) FROM WATERWAYS/ DANGER AREAS ASSISTED	PHASE 2 AMOUNT RELEASED, PHP	DRAWDOWN RELEASED DATE	PHASE 2 TAKE OUT DATE
	NCR	In-City Usufruct	06/15/2016	Marangal Village HOAI (8th Drawdown Billing)	#9 Rosal St., Brgy. Longos, Malabon City	Foundation for Development Alternatives, Inc. (FDA)		10,941,737.92	01/25/2022	
	NCR	In-City	11/26/2014	Alyansa ng Mamamayan ng Caloocan (AMC) (4th Drawdown)	Brgy. 171, Bagumbong, Caloocan City	Kilos Maralita, Inc		15,315,023.92	02/22/23	
	NCR	In-City Usufruct	02/24/2016	Balikatan Samahan Mapulang Lupa (BSML) (2nd Drawdown Billing)	Brgy. Viente Reales, Malanday, Valenzuela City	Lupang Kalinga Development, Inc		20,169,502.08	02/23/23	
	NCR	In-City	11/26/2014	Alyansa ng Mamamayan ng Caloocan (AMC) (5th Drawdown)	Brgy. 171, Bagumbong, Caloocan City	Kilos Maralita, Inc		16,099,139.06	9/9/2022	
	NCR	In-City Usufruct	5/11/2016	Hopeville Phase 2 HOAI	Brgy. 171, Bagumbong, Caloocan City	Humanitarian Intention for Community Empowerment and Reform, Inc. (HI-CER)		9,226,214.13	09/09/2022	
0	Sub-total (Phase 2)						0	71,751,617.11		


C. REFINANCING SCHEME

NO.	REGION	TYPE OF PROJECT	BOARD APPROVAL DATE	PROJECT NAME	RELOCATION SITE	CSO PARTNER	NO. OF INFORMAL SETTLER FAMILIES (ISFs) FROM WATERWAYS/ DANGER AREAS ASSISTED	REFINANCING AMOUNT RELEASED, PHP	REFINANCING TAK EOUT DATE
0				Sub-total (Refinancing)			0	0.00	
				TOTAL HDH (Phases 1 and 2 & Refinancing)			1,334	158,469,619.11	

Prepared by:


Wyndee Grace R. Pena
 Project Development Officer, OSVP for Operations C

Noted by:


Atty. Ronaldo B. Saco
 OIC-Senior Vice President, OSVP for Operations Group



Kaagapay ng Komunidad sa Maginhawang Pamumuhay



SM 1: Utilization of Housing Subsidies for the Provision of Shelter Security and Improved Housing Quality
North-South Commuter Railway Extension Project
 January-September 2022

A. LOT ACQUISITION (Phase 1)

NO.	REGION	TYPE OF PROJECT	BOARD APPROVAL DATE	PROJECT NAME	RELOCATION SITE	CSO PARTNER	NO. OF INFORMAL SETTLER FAMILIES (ISFs) FROM WATERWAYS/ DANGER AREAS ASSISTED	PHASE 1 AMOUNT RELEASED, PHP	PHASE 1 TAKE OUT DATE
1	IV-A			DOTR South Project	Calamba, Laguna		982	59,363,716.10	03/14/2022
1	Sub-total (Phase 1)						982	59,363,716.10	

B. SITE DEVELOPMENT & BUILDING/HOUSE CONSTRUCTION (Phase 2 and 3)

NO.	REGION	TYPE OF PROJECT	BOARD APPROVAL DATE	PROJECT NAME	RELOCATION SITE	CSO PARTNER	NO. OF INFORMAL SETTLER FAMILIES (ISFs) FROM WATERWAYS/ DANGER AREAS ASSISTED	PHASE 2 AMOUNT RELEASED, PHP	DRAWDOWN RELEASED DATE	PHASE 2 TAKE OUT DATE
0	Sub-total (Phase 2 and 3)						0	0.00		

TOTAL HDH (Phases 1, 2 & 3)							982	59,363,716.10		
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Prepared by:

Noted by:

Wyndee Grace R. Pena
 Project Development Officer, OSVP for Operations Group

Atty. Ronaldo B. Saco
 OIC-Senior Vice President, OSVP for Operations Group



Kaagapay ng Komunidad sa Maginhawang Pamumuhay



SM 1. Increase Number of ISFs Provided with Housing Finance Assistance
Marawi Shelter Project
 January-September 2022

A. PHASE 1

NO.	REGION	PROJECT CLASSIF.	PROJECT NAME	LOCATION	CMP-MOBILIZER	NO. OF INFORMAL SETTLER FAMILIES (ISFs) ASSISTED	BOARD APPROVED AMOUNT, Php	TOD
0	TOTAL (A) LOT ACQUISITION					0	0.00	

B. PHASE 2

NO.	REGION	PROJECT CLASSIF.	PROJECT NAME	LOCATION	CMP-MOBILIZER	NO. OF INFORMAL SETTLER FAMILIES (ISFs) ASSISTED	BOARD APPROVED AMOUNT, Php	TOD
	BARMM		Marawi Shelter Project Phase III (1st progress billing - Site Development)	Patani Marawi City			44,896,566.93	02/18/2022
	BARMM		Marawi Shelter Project Phase II - Construction of Retaining Wall - (1st Progress Billing)	Patani Marawi City			5,005,445.31	03/07/2022
	BARMM		Marawi Shelter Project Phase I - Construction of Retaining Wall - (1st Progress Billing)	Patani Marawi City			3,064,523.35	03/03/2022
	BARMM		Marawi Shelter Project Phase I - Construction of Retaining Wall - (2nd Progress Billing)	Patani Marawi City			4,487,689.17	07/25/2022

	BARMM		Marawi Shelter Project Phase II - Construction of Retaining Wall - (2nd Progress Billing)	Patani Marawi City			5,404,492.94	07/25/2022
	BARMM		Marawi Shelter Project Phase III (2nd progress billing - Site Development)	Patani, Marawi City			50,946,474.40	07/29/2022
0	TOTAL (B) SITE DEVELOPMENT					0	113,805,192.10	
0	GRAND TOTAL (A + B)					0	113,805,192.10	

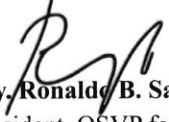
Note:

*For drawdown, TOD refers to date of check

Prepared by:


Wyndee Grace R. Pena
 Project Development Officer, OSVP for Operations Group

Noted by:


Atty. Ronaldo B. Saco
 OIC-Senior Vice President, OSVP for Operations Group

STRATEGIC MEASURE 2:

Percentage of Satisfied Customers

Signed Supporting Document



Kaagapay ng Komunidad sa Maginhawang Pamumuhay



MEMORANDUM

FOR : **MR. FLORENCIO R. CARANDANG, JR.**
OIC-Vice President, Corporate Planning and Communications Group

THRU : **KEVIN D. TAN**
OIC-Vice President, Systems Coordination Group

FROM : **ELVIRA G. INTON**
OIC-Manager, Customer Relations and Complaints Department

SUBJECT : **THIRD QUARTER STATUS MONITORING REPORT
ON THE STRATEGIC MEASURES 2A AND 2B**

REF. NO. : CRCD 107_2022

DATE : 09 NOVEMBER 2022

The Customer Relations and Complaints Department (CRCD) hereby transmits the accomplishment/status monitoring report on the Strategic Measure 2: Percentage of Satisfied Customers for both a) Pre-Takeout and b) Post-Takeout Surveys in compliance with the Corporate Planning and Communications Group's memorandum¹ on the submission of the same.

To satisfy the requirements for this measure, the SHFC conducts its annual Customer Satisfaction Survey (CSS) through a third-party service provider with the target of 90% satisfactory rating for both pre-takeout and post-takeout surveys. In July of the current year, the People Dynamics, Inc. (PDI) commenced its services to SHFC after being chosen to implement the 2022 CSS project. The CRCD, on the other hand, provided all the documents and information needed by the PDI as part of its responsibilities as the unit overseeing the measure. In the same month, SHFC submitted to the Governance Commission for Government-Owned and Controlled Corporations (GCG) its request for modifications on their prescribed pre-takeout and post-takeout survey questionnaires. The CRCD and CSS Technical Working Group sought the GCG's approval on the following modifications:

- a. Changes in the terms used, from generic to specific and more appropriate terms (e.g. from "company" or "organization" to "homeowners association");
- b. Additional items in Part III, Execution of Service; and
- c. Inclusion of several items in the socio-demographic profile of the respondents that are relevant to Gender and Development subsequent to the recommendations of the Program Development and Enhancement Group (e.g. civil status, items on solo parents, persons with disabilities, and pregnant women, among others).

¹ CPCG Memorandum with reference no. CPCG 2022_525-044 dated 02 November 2022

In August 2022, the CRCD provided the PDI with the complete and updated lists of respondents for the project. With the GCG's approval² of all requested modifications on the questionnaires received by SHFC in the first part of September, the PDI furnished the CRCD with its final submission of Inception Report and survey tools to be utilized for this project. They then proceeded with the pre-test to check the quality of the instruments in a veritable respondent/scenario and started the actual project implementation or data collection in October.

To ensure that the data to be gathered from this project is of highest quality possible, the PDI is required to submit its report on quality control procedures as well as its other deliverables specified in the table below for your information and reference:

ACTIVITY	DELIVERABLES	PERCENTAGE OF PAYMENT	STATUS
Preliminaries	<ul style="list-style-type: none"> Inception Report 	10% of the contract price	Completed and submitted to SHFC. The payment of which has been settled by the SHFC.
Pre-Test	<ul style="list-style-type: none"> Survey Instrument Stimulus Materials Pre-test Results Pre-test Report 	20% of the contract price	Completed but not yet submitted to SHFC, except the survey instruments
Training	<ul style="list-style-type: none"> Training Manual Training Report 		Completed but not yet submitted to SHFC
Project Kick-off/ Start-off	<ul style="list-style-type: none"> Observation Report Clearing/Debriefing Report 	30% of the contract price	Completed but not yet submitted to SHFC
Project Implementation	<ul style="list-style-type: none"> Supervision/ Observation/ Spot Checking Report Fieldwork Progress Report 		Ongoing
Back-Checking and Spot-Checking	<ul style="list-style-type: none"> Back Checking/ Spot-Checking Report 	30% of the contract price	Pending
Data Processing	<ul style="list-style-type: none"> Spot Checking Report for Data Processing Data Quality Control Report 		Pending
Analysis	<ul style="list-style-type: none"> Certificate of Rating Final Report Sex Disaggregated Data Report 	10% of the contract price	Pending

² GCG Letter re: Request for Modifications on SHFC's 2022 Customer Satisfaction Survey dated 30 August 2022

Kindly note that as stated in the Consulting Services Agreement for the 2022 CSS project, all the preceding activities and/or deliverables shall be completed and/or submitted on or before December 31, 2022 unless an extension is warranted under the circumstances.


ELVIRA G. INTON

Attachments:

1. *Inception Report*
2. *GCG's Letter of approval to SHFC's request for modification on CSS questionnaires*



CONSULTING SERVICES FOR THE IMPLEMENTATION OF THE SOCIAL HOUSING FINANCE CORPORATION'S 2022 CUSTOMER SATISFACTION SURVEY

INCEPTION REPORT



YEAR 2022

This Inception Report details the objectives, methodology, work plan, and timeline of The Development and Implementation of the 2022 Customer Satisfaction Survey of the Social Housing Finance Corporation (SHFC).

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I. Introduction

A. Purpose

This inception report details the work program of the project "Customer Satisfaction Survey (CSS) 2022 for the Social Housing Finance Corporation (SHFC)." It is primarily based on discussions held between the team from People Dynamics, Inc. (PDI) and representatives of SHFC in a virtual inception meeting held last 14 July 2022.

Discussions during the inception meeting mainly comprised of the PDI consulting team's questions regarding the implementation of the project (such as clarifications on the coverage of the 2022 CSS, SHFC's scorecard target for the CSS 2022, factors that might affect the satisfaction level, and agreements on project timelines). Among the items tackled includes the expressed concerns by the SHFC team (which includes the collection of the list of landowner's contact details and the addition of questions to the CSS questionnaire for GCG approval). PDI consulting team then requested documents from the SHFC team (such as the copy of the prescribed GAD framework, revised CSS questionnaire with additional GAD-related items upon GCG approval, updated complete contact lists of CMP mobilizers, and endorsement letter stating that PDI has been commissioned to undertake the CSS for SHFC for the data collection phase).

B. Context

The Social Housing Finance Corporation (SHFC) is a government-owned and controlled corporation created in 2004 through Executive Order No. 272 and operationalized in 2006.

It is mandated to develop and implement social housing programs for low-income families in the informal and formal sectors through the provision of a financing scheme that will assist and enable the informal settler families (ISFs) to own the lots they occupy, or where they choose to relocate to.

The SHFC envisions achieving its development agenda of uplifting the lives of the ISFs by Building Adequate, Livable, Affordable, and Inclusive (BALAI) Filipino Communities through its Flexible, Affordable, Innovative, and Responsive (FAIR) shelter solutions, namely, the Community Mortgage Program (CMP), High-Density Housing (HDH) Program, and other social housing programs.



In its desire to provide the highest ethical standards in dealing with its clientele, SHFC would like to engage the services of a research/survey provider to conduct a transparent and objective Customer Satisfaction Survey (CSS) of its clients nationwide. The CSS is a valuable tool to gather information on customer satisfaction levels and will enable SHFC in identifying areas where it does well and/or areas to improve to meet the needs of all its stakeholders.

In alignment with its goal of providing for more inclusive housing development and in line with the approval of the SHFC Board of Directors during its meeting on 25 July 2019 under Board Resolution No. 760, Series of 2019, Social Housing Finance Corporation also places a significant consideration to gender and development (GAD). This is well imbued in SHFC's Gender and Development Policy Statement stressing that the Social Housing Finance Corporation recognizes that women and girls are powerful agents of change and are key actors in the development of empowered, sustainable, and resilient communities. Providing women and girls with equal access to resources and opportunities to realize their full potential ensures the success of the family and the community. Likewise, Social Housing Finance Corporation strongly advocates for women's empowerment and gender equality. Consistent with the strategies in the Philippine Development Plan to adopt a "gender-responsive community-driven development approach in shelter provision towards safe and secure communities," Social Housing Finance Corporation is committed to establishing policies, procedures, programs, and practices to facilitate women's participation in the planning, decision-making, and implementation of its community-driven housing programs. SHFC also fully accepts and assumes its role as a champion of women's rights, fighting all forms of discrimination against women and girls, and is ready to provide the necessary social protection mechanisms, resources, and support to further women's causes, especially those belonging to the marginalized urban poor.

The Gender and Development Policy of SHFC shall be implemented within the organization and to its clients. It is therefore expedient to integrate the different information that can be useful for GAD-related policy advisories and directions derived from the CSS results into this partnership.



The CSS is also in compliance with a requirement of the Governance Commission for GOCCs (GCG) for all government-owned and controlled corporations (GOCCs). Likewise, it is one of the targets of SHFC's 2022 Performance Scorecard.

The 2022 SHFC CSS shall be implemented according to the guidelines and standards prescribed in the Enhanced Standard Methodology on the Conduct of Customer Satisfaction Survey. The GCG – approved questionnaire shall likewise be utilized in the data collection.

In connection with this, the GCG has released additional guidelines in the conduct of the 2022 CSS as contained in the GCG Notice to All Stakeholders dated 14 August 2020, in view of the circumstances brought about by the COVID-19 pandemic. The additional guidelines take into account the safety of the respondent-customers and the difficulties that may be encountered during this time relative to the conduct of the intercept or face-to-face methods of interview. These guidelines shall be complied with in the conduct of this study.



II. Technical Assistance

A. Rationale

The rationale for this Technical Assistance (TA) arises from the need to:

1. Conduct and administer the 2022 Customer Satisfaction Survey for SHFC using the Enhanced Standard Methodology issued by the Governance Commission for Government-owned or Controlled Corporations (GOCCs);
2. Devise guide questions for the conduct of focus group discussions on selected participants from partner LGUs;
3. Conduct and administer the SHFC feedback mechanism for CMP mobilizers, landowners, and contractors;
4. Support SHFC's function of exercising stewardship in providing satisfactory service to its customers; and
5. Assist SHFC in assessing the organization across the identified dimensions and determining possible areas of improvement to ensure continued quality service to its stakeholders.
6. Provide GAD-related information from the CSS results that will help enhance the GAD programs, projects, and activities of SHFC in terms of, but not limited to, women's satisfaction and quality of service received.

B. Objectives

The study aims to determine stakeholders' satisfaction with SHFC's services in the following dimensions:

1. Project application processes or the pre-takeout processes, which include background investigation, site inspection, appraisal, title validation, loan examination, and mortgage examination;
2. The loan administration processes or the post-takeout management, which include loan amortization payment, individualization of title, substitution, and release of the Transfer Certificate of Title (TCT);
3. Mobilizers' and Landowners' experiences and feedback in transacting with



SHFC; and



4. Landowners' experiences and feedback in transacting with Mobilizers.
5. Partner LGU's experiences and feedback on the services provided by SHFC.
6. Significant difference between men and women, if any, in terms of the level of satisfaction with availed services.

C. Tasks

People Dynamics, Inc. (PDI) shall abide by the Guidebook for GOCCs Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey for CY 2022 which shall commence upon issuance of the Notice to Proceed (NTP).

Specifically, PDI commits to undertake the following:

1. **Inception Meeting.** PDI and SHFC shall meet to discuss the particulars of the project. This shall be an opportunity for SHFC to explain its expectations and requirements. This shall likewise be an opportunity to 1) address clarifications raised by the PDI consulting team pertinent to the implementation of the engagement and the expected output and 2) agree on the approach and the methodology and/or amendments, if any, that will be followed and the project schedules and milestones.

A focal person from the SHFC was designated at this point, to ensure that communication channels are well established and action plans are carried out within the agreed timeframe. This SHFC focal person shall coordinate with the PDI during the entire period of engagement.

Thereafter, PDI will submit the Inception Report for SHFC's review and approval. This shall serve as the documentation of the agreements established during the Inception Meeting. This report shall detail the specific timelines for the project activities, the necessary support needed from SHFC, anticipated challenges, and contingency plans.

2. **Desk Review.** The researchers will also undertake a desk review of existing studies and statistical data on previous results of the SHFC Customer



Satisfaction Survey. Concerns to be identified in this desk review will be carefully considered in the design of the final survey methodology and any other items to be included in the CSS questionnaire as rider questions if deemed necessary.

3. **Identification and Review of survey instrument as transmitted by GCG.**
 - a. Conduct a review of, possibly revise items specific for SHFC, and format the survey instrument accordingly;
 - b. Pilot test the survey instruments and relay feedback for possible revisions, as may be necessary;
 - c. Finalize the survey instrument with the approval of SHFC;
 - d. Conduct the survey which shall consist of the data collection set-up, data collection proper, and administration of the survey questionnaire using the Telephone Interview Method;
 - e. Craft questions for the FGD and seek SHFC approval;
 - f. Conduct the FGDs, coordinate with selected participants, data collection set-up, and data collection proper;
 - g. Develop the Stakeholder Feedback Mechanism (SFM) instrument: review and revision of items specific for SHFC, finalization, and seek SHFC approval;
 - h. Conduct the Stakeholder Feedback Mechanism (SFM) survey;
 - i. Data cleaning and validation, thematic analysis, computation of descriptive and inferential statistics;
 - j. Writing and submission of initial results including data files, and review of suggestions and/or comments as indicated in the survey;
 - k. Present results of the survey to the Management Review Meeting; and
 - l. Submit all documents including the final report in both electronic and hard copies.
4. **Survey/Interview Implementation Plan.**
 - a. Utilize the standard survey instrument transmitted by the GCG;
 - b. Administer the survey following the guidelines set forth by the GCG on the conduct of CSS of the GOCCs under its jurisdiction (Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey and Additional Guidelines);



- c. Any additional question/s shall be referred to the GCG for consideration and approval;
 - d. Indicate the gender/sex in the profile of respondents for all the sets of survey instruments and FGD guide questions;
5. **Survey results (Preliminary Report)/Certificate of Rating.** A preliminary report shall be submitted to SHFC along with the Certificate of Rating reflecting the Customer Satisfaction Rating obtained from the CSS 2022 Conduct. In writing the report, the following shall be considered:
- a. Indicate the frequency and the percentage, where applicable, for all survey results; and
 - b. Treat all information as strictly confidential and shall not disclose such information to any third party without prior written approval from SHFC. All the assigned project personnel will keep in complete secrecy all the information as well.
6. **Final report (Comprehensive Report).** PDI will submit the required copies of the Final Report in both electronic and hard copies. The analysis plan, that is required by GCG and is detailed in this Inception Report, will serve as the basis for the preparation of the Final Report. The results shall be analyzed by looking into the segments enumerated therein, in compliance with the requirements of GCG.

The Final Report shall include the following analyses required by the GCG Guidebook (as regards the data obtained using the CSS questionnaires), which are as follows:

- a. Data gathering methodology
- b. Percentage of satisfied customers using top 2 boxes (very satisfied and satisfied)
- c. Averaging the overall satisfaction rating
- d. Comparison of current year ratings versus previous year ratings
- e. Crosstabs of the reasons for overall satisfaction rating against the type of raters (positive and negative) to determine the top reasons for satisfaction and top reasons for dissatisfaction
- f. Deriving Importance
- g. Plotting in Scatter Diagram



- h. Best practices in customer service will be identified as well as action plans identified. This will be developed in close coordination with the process owner.
7. **Commissioning and Sign-Off.** Upon acceptance of the Final Report, SHFC shall issue a Certificate of Satisfactory Completion to PDI and accomplish a Client Satisfaction Survey.

D. Data Confidentiality and Security

1. **Non-Disclosure and Confidentiality Agreement.** If SHFC so requires, PDI shall sign a Non-Disclosure and Confidentiality Agreement which guarantees the following:
 - The list shall only be used for this particular study and shall not be shared with anyone who is not involved in the project.
 - The master list shall only be provided to the researcher who will be doing the systematic selection. All field interviewers shall only be provided with the list of respondents they will be contacting.
 - The list shall be deleted after data collection and encoding. No copies of the list, in either printed or in soft copy formats, shall be retained by PDI.
2. **PDI's Data Privacy Thrust** – In compliance with Republic Act No. 10173 or the Data Privacy Act of 2012 (DPA), People Dynamics, Inc., is committed to its mission to protect, respect, and secure personal data and data privacy rights of its employees, clients, and the candidates who have been endorsed for testing by various organizations. PDI highly adheres to the general principles of transparency, legitimate purpose, and proportionality of the provisions of the Data Privacy Act as well as the National Privacy Commission's circulars and advisories. All authorized personnel, including its employees, consultants, and the top management, are equally responsible to comply with the Data Privacy Act of 2012 and observe the procedures and processes stated in its Data Privacy Manual while protecting and upholding the right of the data subjects with the highest deference.



- 2. Confidentiality** – PDI will not, except as authorized or required by PDI's duties herein stated, reveal or divulge to any person or entity any information concerning the organization, business, finances, transactions, or other affairs of SHFC which may come into PDI's knowledge in the course of this engagement, and PDI will keep in complete secrecy all confidential information entrusted to them and will not use or attempt to use any such information in any manner which may injure or cause loss either directly or indirectly to the interest of SHFC. PDI will ensure that all information shared by SHFC under this project will remain confidential even after the termination of the contract. PDI will also observe the rules on confidentiality and code of ethics as applicable to officials of the public service.
- 3. Informed Consent & Confidentiality** – The respondent's right to confidentiality shall always be respected and any legal requirements on data protection are adhered to. The cover letter of the survey questionnaire will inform the respondent about the objective of the survey and the confidentiality of their responses. Their consent to participate in the survey will be obtained and recorded.



III. Resource Requirement, Assumptions, and Causes of Delay

A. Resource Requirement

It is expected that SHFC will provide:

1. GCG-approved questionnaire.
2. List of respondents with updated contact details for the conduct of the agreed interview schedules.
3. Focal Person from SHFC to assist PDI in any inquiries pertaining to the conduct of the project.
4. Technical support, conference room for the presentation of the reports (if lockdown policy is lifted), or best platform to conduct an online meeting (if the presentation will be conducted within the quarantine period).
5. Copy of GAD framework.
6. Draft of questions SHFC wants to include in the questionnaire.
7. Data Collection Endorsement Letter.
8. Feedback shall be sent via email for inquiries and clarifications from the PDI consulting team.
9. Certificate of Satisfactory Completion upon submission of all required project outputs.

B. Assumptions

1. It is assumed that all information related to the respondents' contact information submitted to the PDI project team is updated. PDI assumes that the contact list only includes those clients who have transacted with SHFC during the prescribed duration for the 2022 SHFC CSS. **Thus, PDI can only commence with the sample size computation and mobilization upon receipt of the contact list.**
2. It is assumed that the survey questionnaire as transmitted to PDI is already approved by GCG for utilization in the data collection. **Thus, pilot testing**



and data collection can only commence once PDI received the GCG-approved survey questionnaire.

3. It is expected that the profile of the end-users of SHFC (preferably including area/region, branch, and stakeholder classification) will be supplied by SHFC before undertaking data collection. Additionally, for the critical step of ensuring homogeneity among selected LGU respondents who will participate in the FGD, SHFC will provide data on participants' age, gender, area of residence, educational attainment, LGU designation, and social class.
4. SHFC focal persons for this project will be designated to assist the project team.
5. SHFC will be able to provide timely feedback on submitted deliverables needed for project completion.
6. Identified key informants from the different offices (i.e., community association respondents, LGUs, landowners, CMP-mobilizers, and contractors) nationwide will be available for interview schedules/focus group discussion.
7. Identified key informants described in assumption #6 have stable internet access and have the online platform required for the conduct of the FGD.

C. Causes of Delay

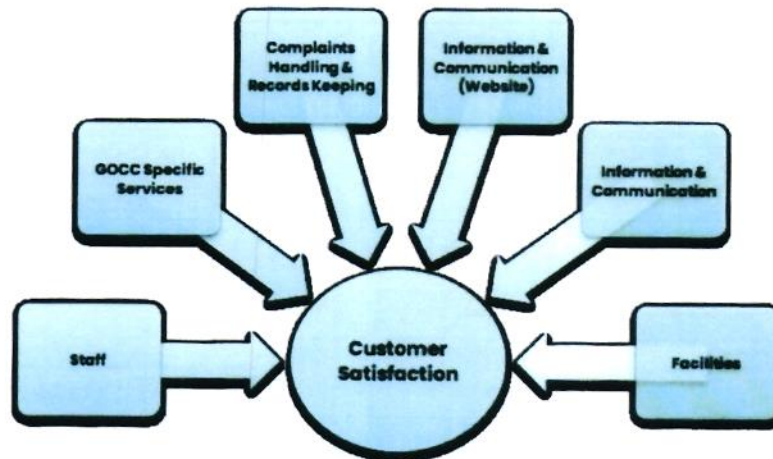
1. **Lack of contact information of target respondent.** If the contact information included in the list of survey respondents is not updated, then the risk of delay will be greater, since efficiency will understandably be compromised.
2. **Unavailability of the respondent.** This means the unavailability of identified personnel to engage in conversation during the telephone interviews could translate to setbacks in the timely gathering and analysis of data. This in turn could potentially lead to delays in the completion of the report.



3. **Delays in getting approval of the deliverables.** Delays in feedback and approval by SHFC of submitted reports and other deliverables.
4. **Lack of Representation.** This refers to the unavailability of qualified participants for the FGDs which is an essential component of the data collection process.

IV. Theoretical Framework

The CSS 2022 will include the standard GCG-prescribed CSS attributes as well as items specific to SHFC





V. Methodology

People Dynamics, Inc. (PDI) shall conduct CSS 2022 following a mixed-methods approach (which shall be detailed in the succeeding sections). This approach combines quantitative and qualitative data in addressing the study's formulated research questions. The quantitative approach shall utilize the main instruments, particularly the GCG-Prescribed Survey Questionnaire and the Survey Feedback Mechanism (SFM), while the qualitative approach will utilize Focus Group Discussions (FGDs) as a means to validate survey findings.

A. Research Questions

The study will specifically aim to answer the following research questions pertinent to their pre-takeout and post-takeout transactions among Community Associations:

1. What are the basic demographics of the Pre-Takeout respondents in terms of the following?
 - a. Sex
 - b. Age
 - c. Civil Status
 - d. Educational Attainment
 - e. Working Status
 - f. Other demographics agreed upon by PDI and SHFC to be included in the survey questionnaire.
2. What are the basic demographics of the Post-Takeout respondents in terms of the following?
 - a. Sex
 - b. Age
 - c. Civil Status
 - d. Educational Attainment
 - e. Working Status
 - f. Other demographics agreed upon by PDI and SHFC to be included in the survey questionnaire.
3. What is the Overall Level of Customer Satisfaction (in Percentage Top 2 Boxes, i.e., Very satisfied and Satisfied) and Mean Overall Satisfaction Rating of SHFC Pre-Takeout Clients?



4. What is the Overall Level of Customer Satisfaction (in Percentage Top 2 Boxes, i.e., Very satisfied and Satisfied) and Mean Overall Satisfaction Rating of SHFC Post-Takeout Clients?
5. What is the Overall Satisfaction (in Percentage Top 2 Boxes, i.e., Very satisfied and Satisfied) and Mean Overall Satisfaction Rating of SHFC clients by customer groups per Service Attribute:
 - Pre-Takeout Clients; and
 - Post-Takeout Clients?
6. What are the specific reasons or explanations for satisfaction/dissatisfaction ratings of customers which could help SHFC improve its current products and services (Mean Attribute Ratings and Thematic Analysis of Reasons for Rating given by the respondent)?
7. What are the true drivers/factors for the customer satisfaction/dissatisfaction scores, as a tool for improving the level of service of SHFC (Regression Analysis)?
8. What are the customers' suggestions and recommendations for the improvement of SHFC Services (Thematic Analysis)?
9. Is there a significant difference between the level of satisfaction of the respondents in the 2022 SHFC CSS as compared to the 2021 SHFC CSS results?
10. What is the extent of the CSS 2022 women respondents' perception in terms of:
 - a. Satisfaction,
 - b. Delivery of services,
 - c. Other areas of concern?
12. What is the statistical association between women and men in terms of satisfaction level in services availed in 2022?

B. Research Design

Both quantitative and qualitative methods of data gathering and analyses shall be undertaken in this study. **The Telephone Interview Method shall be utilized as the primary data collection method.**



Focus group discussions (FGDs) shall likewise be conducted to supplement the data collected. Local government units (LGUs) shall be the target participants for the FGDs.

1. **Survey Method.** The survey method delivers a detailed and quantified description of a population. It provides a general picture of the population under investigation, describes the nature of existing conditions, or determines the relationships that exist between and among specific variables (Sapsford, 1999). The survey method uses self-reports that directly elucidate the belief, ideas, feelings, and behavior of a specific population about issues, activities, and information among others. It involves researchers or interviewers asking (usually) a large group of people questions about a particular topic or issue. This research protocol was crafted to ensure compliance with the Guidebook for GOCCs-Enhanced Standard Methodology for the **Conduct of the CSS, Additional Guidelines in the Conduct of the CSS for 2020** in the GOCC Sector, and all other issuances on the new normal guidelines released by the IATF.

A reflection of customer satisfaction will be gathered from landowners, CMP mobilizers, and contractors using a separate feedback mechanism survey. **This tool is not a requirement of the GCG but will contain items for measuring satisfaction similar to the pre-takeout and post-takeout surveys.**

2. **Focus Group Discussions (FGDs).** PDI will also conduct FGDs to explore other dimensions that were not covered using the survey tools. For the respondents from partner LGUs, Focus Group Discussions (FGDs) will be conducted. An FGD is frequently used in qualitative research to gain an in-depth understanding of social issues, as well as for advocating the use of participatory research. It is similar to key informant interviews (KII), as this method aims to obtain data from a purposively selected group of individuals rather than from a statistically representative sample of a broader population (Nyumba et al., 2018). However, an FGD differs from the KII mainly because an FGD is facilitated, rather than led, by an interviewer. Among the added usefulness of FGDs are their ability to facilitate synergy among its participants, providing immediate validation and clarification of concepts and processes being discussed, and generating an exhaustive list of responses for a research question.

C. Target Respondents/Inclusion Criteria

The target respondents for each area of this study are the following:



1. **Primary Respondents – Community Associations (via GCG-prescribed questionnaires).** Standard GCG prescribed CSS attributes, such as staff, SHFC-specific services, complaints handling and records-keeping, information and communication, information and communication through the website, and SHFC's facilities will be included in the SHFC CSS 2022.
2. **Primary Respondents – Partner LGUs (via FGD).** Standard GCG prescribed CSS attributes, such as staff, SHFC-specific services, complaints handling and records-keeping, information and communication, information and communication through the website, and SHFC's facilities will be included in the SHFC CSS 2022.
3. **Other Stakeholders – CMP-Mobilizers, Landowners, & Contractors (via Stakeholder Feedback Mechanism).** The stakeholder feedback mechanism (SFM) will help identify improvement areas in SHFC's services to strengthen the organization's policies by obtaining feedback on SHFC programs and policies, among others, from other stakeholders. This shall be conducted with SHFC's program partners, i.e., CMP Mobilizers (Non-Government Organizations and Civil Society Organizations), landowners, and contractors.

The target respondents for each area of this study and the corresponding instruments are summarized in the next table:

Table 1: Target Respondents per Area of the Study and Corresponding Instruments

Area of the Study	Respondents	Instruments
Pre-Take Out Survey (Loan Application Process)	Primary Respondents: Community Associations	GCG transmitted- Questionnaire (with revisions/additions- GAD as approved by GCG)
Post-Take Out Survey (Loan Administration Process)	Primary Respondents: Community Associations	GCG transmitted- Questionnaire (with revisions/additions- GAD as approved by GCG)
Focus Group Discussions	Primary Respondents:	FGD Interview Guide

Area of the Study	Respondents	Instruments
	Partner Local Government Units (LGUs)	
Stakeholder Feedback Mechanism (SFM)	Other Stakeholders: CMP-Mobilizers (NGOs, CSOs), Landowners, and Contractors	SFM Questionnaire

D. Sample / Sampling Technique

The determination of the acceptable minimum sample sizes shall be based on the adjusted projections of the total population for 2022 (across the different customer and stakeholder groups). Further, for the GCG-prescribed surveys, the estimated sample size for each Customer Type shall be determined following the parameters in the Guidebook for GOCCs on the Enhanced Standard Methodology for the conduct of the CSS.

1. Sample Size Computation

The required sample sizes per customer type are as follows:

Table 2: Target Sample Sizes from each Customer Type

SHFC Customer Type	Population	GCG Prescribed Sample Size*
Pre -takeout Accounts	270	100
Post -takeout Accounts	914	100

*Based on GCG Guidelines Section IV-C-c (MOE of +/- 9.8% at 95% confidence level.)

E. Sampling Technique

The selection of the respondents will be done through the systematic sampling technique using a customer list provided by the GOCC (SHFC). The customer list must be complete with the customer's name and correct/updated contact details.

The procedure for the systematic sampling technique for telephone interviews shall be conducted as prescribed in the Enhanced Standard Methodology for the Conduct of the Customer Satisfaction Survey, page 8 of 32, as follows:



- a. Create a contact list and identify the population size
- b. Clean, segment, and group customers based on how data is to be analyzed
- c. Identify sample size
- d. Compute for sampling interval number
- e. Select the respondents using the interval number
- f. Contact respondents for the interview

In cases when the selected respondent does not meet the required criteria or is not willing to participate in the survey, the interviewers will continue with the interval scheme in identifying the next interviewees, until the required customer sample is met.

SHFC will submit (in soft copy) the list of customers / qualified respondents including names and contact information (i.e., email addresses, mobile or landline numbers) to PDI, before the conduct of the systematic selection. The GCG Guidebook stipulates such to be submitted to the third-party research agency for data-gathering methodologies, such as the telephone interview method, which requires a list of customers.

The final number of participants for the respondent groups (customer associations, partner LGUS, CMP mobilizers, landowners, and contractors) shall be determined as soon as the list of target respondents has been provided by SHFC. As mentioned earlier, sample sizes for the different respondent groups shall comply with the Guidebook for GOCCs on the Enhanced Standard Methodology for the conduct of the CSS. This will apply particularly to the Main Survey (CSS) and the Stakeholder Feedback Mechanism (SFM).

For the FGD, the selection of respondents shall be based on certain parameters to ensure homogeneity of the participants per group. Such parameters may include, but may not be limited to, age, gender, area of residence, educational attainment, LGU designation, and social class.

F. Instruments

The following instruments shall be utilized in this study:



1. **Main Survey Questionnaire (CSS).** PDI will utilize CSS questionnaires prescribed and transmitted by GCG to SHFC. These transmitted questionnaires are structured questionnaires with a 5-point Likert Scale, as tabulated below. PDI shall ensure that the explanation of the scale will be read out to the respondents.

Table 3: Survey Response Format

<i>Very Satisfied</i>	<i>Satisfied</i>	<i>Neither Satisfied nor Dissatisfied</i>	<i>Dissatisfied</i>	<i>Very Dissatisfied</i>
5	4	3	2	1

Table 4: Survey Response Format for Perception of Service Attributes Availed

<i>Strongly Agree</i>	<i>Agree</i>	<i>Neither Agree nor Disagree</i>	<i>Disagree</i>	<i>Strongly Disagree</i>
5	4	3	2	1

- a. **Pre-Survey.** PDI will review the existing survey questionnaires along with key documents pertinent to the engagement. PDI will develop or enhance the survey questionnaires, where allowed or applicable, and submit these to SHFC for approval.

Further, PDI will NOT alter any questions, under the Main Questionnaires of the GCG-prescribed and transmitted questionnaires.

A pre-test shall be performed to check content and face validity and to standardize the conduct of the interview, which is estimated to run at 15 minutes. In case the questionnaire is longer than 15 minutes, the information covered will be reviewed, and checked for the prioritization of questions/items.

Thereafter, PDI will conduct a pilot test of the three (3) survey instruments on actual respondents/scenarios to:

- i. Ensure clarity and comprehension
- ii. Check for bias
- iii. Assess interview/survey administration length



- iv. Anticipate possible issues in survey administration, secure resolutions, and include these in the online survey platform.

PDI will review the results of the pre-test and where allowed and necessary, fine-tune any item or instructions in the survey questionnaires. PDI will NOT alter any questions, under the Main Questionnaires of the GCG-prescribed and -transmitted questionnaires.

- b. **Training.** PDI shall provide training to its CSS project team members, specifically the telephone interviewers to:
 - i. Give an overview of the project, its design, and its objectives.
 - ii. Train on sampling procedure and selection of respondents.
 - iii. Brief on the questionnaire administration, emphasizing standardization in terms of procedures
 - iv. Practice skipping and routing questions.
 - v. Do mock interviews amongst themselves to familiarize themselves with the questions and to test their comprehension of the instructions.

G. FGD Guide

PDI will develop/enhance an FGD schedule that will collect demographic data as well as important exploratory questions as prescribed and communicated by SHFC. These exploratory questions are related to respondents' (partner LGUs) experiences with SHFC and their understanding of SHFC operations.

H. Stakeholder Feedback Mechanism (SFM)

PDI will develop/enhance items in the previous feedback mechanism endorsed by SHFC. Aside from the overall satisfaction scale, other target questions in this tool will include: 1) problems encountered in SHFC-related transactions, and 2) suggestions to improve services.

Survey questionnaires or FGD schedules will be administered to the corresponding respondent groups.

Table 5: Summary of Instruments and Respondent Groups for the 2022 CSS

Instruments	Respondent Groups
1. GCG-prescribed-and-transmitted CSS questionnaire for SHFC's Business Organization Customers for Community Associations (CAs) with regard to <i>Pre-Takeout</i> Transactions	Community Associations' (CAs) Taken-out projects in 2022 and project applications in 2022, including pipeline projects received in 2021 regardless of the status.
GCG-prescribed-and-transmitted CSS questionnaire for SHFC's Business Organization Customers for CAs with regard to <i>Post-Takeout</i> Transactions	Community Associations' (CAs) Taken-out projects from 2010 to 2021.
3. FGD Schedule for <i>Local Government Units</i> to be developed or enhanced by PDI for <i>Pre-Takeout</i> Transactions	LGUs that assisted CAs from projects taken out in 2022 including project applications received in 2022 as well as pipeline projects in 2021 regardless of the status of the project.
4. Stakeholder Feedback Mechanism (SFM) for SHFC's <i>CMP Mobilizers</i> to be developed or enhanced by PDI.	CMP-Mobilizers (Non-Government Organizations & Civil Society Organizations)
5. Stakeholder Feedback Mechanism (SFM) for SHFC's <i>Landowners</i> to be developed or enhanced by PDI.	Landowners
6. Stakeholder Feedback Mechanism (SFM) for SHFC's <i>Contractors</i> to be developed or enhanced by PDI.	Contractors

I. Data Collection

PDI shall utilize the Telephone Interview Method in administering the GCG-transmitted questionnaires to community association (CA) - respondents.

The project team will conduct a pilot testing of the survey instrument for feedback on possible revisions and suggestions. Data collection will be done by trained telephone interviewers using a structured pen and paper questionnaire, through electronic software or online platforms. The telephone interviews shall be done for a maximum of 15 minutes, in line with GCG standards.

1. Main CSS Administration

PDI will utilize the **Telephone Interview Method** wherein:



- a. SHFC will submit the list of respondents for each of the respondent groups along with their email addresses and mobile numbers to PDI.
- b. SHFC will follow the systematic sampling technique stipulated in the GCG Guidebook, which includes computing for and using a sampling interval number and identifying a random start number.
- c. Data gathering and encoding for data obtained through it will be supervised by the Data Processing Manager assigned to the project, who will also oversee data verification and validation. The completed survey questionnaires will be uploaded to the Statistical Package for the Social Sciences (SPSS) for data checking, processing, and analysis.

Informed Consent. PDI will seek the explicit, written consent of the respondents, at the beginning of every interview. Should there be any requirement from GCG or SHFC to reveal the identity of the respondent with regard to their addresses or locations, they will be served as far as the consent given by the respondents will allow. If the respondents want to keep their locations/addresses confidential and detached from the survey results, this will be adhered to. Furthermore, information on the identity of respondents that can be disclosed to GCG and SHFC will only be limited to their addresses/locations, as stipulated in the GCG Guidebook on CSS conduct.

PDI shall ensure that data collection quality control procedures are observed following the CSS Guidebook.

Data gathering and encoding will be supervised by the Data Processing Manager (DPM) assigned to the project, who will also oversee data verification and validation.

The data from the completed survey questionnaires will be uploaded to the Statistical Package for the Social Sciences (SPSS) for data checking, processing, and analysis.

Back-checking and Spot-checking. PDI will undertake spot-checking and back-checking.

Back-checking is the subsequent re-contacting or revisiting of respondents to check whether the interviews were conducted and completed and whether the responses recorded by the interviewer were consistent and accurate. As a standard, at least 30% of the total sample size will be back-checked.

Spot checking involves going to the data collection area to check among others if:



- a. Interviewers did proper sampling
- b. Proper skipping was implemented
- c. Interviewers are indeed in the area covered by the study
- d. Interviewers are interviewing correctly

As part of the ESOMAR codes and guidelines, the identity of the respondents will be kept confidential from the GCG and SHFC. If there is a requirement from the GCG or the SHFC 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 only be limited to their addresses/locations. However, in case a respondent wishes to keep one's locations/addresses confidential and detached from the survey results, GCG, SHFC, and PDI shall adhere to such preference.

Data Processing. Once data has reached zero error, data will be prepared for table processing. Data tabulation specifications or tab specs will be developed by the researcher, for approval of the GOCC, as the reference of the data processing team.

PDI shall prepare data tabulation specifications or tab specs for approval of SHFC ExeCom as required by the CSS Guidebook. The data processing will involve descriptive statistics and several cross-tabulations, depending on the data requirements.

All tables shall undergo statistical tests at a 95% confidence level, or 90% depending on the questions that are being tested for significance. The tab specs must include the following details:

- a. List of tables with table titles and base descriptions
- b. A segment to be read in the table banners/headers
- c. Stubs or lists of responses
- d. Formatting of the Tables
- e. Filters/logic checks, and
- f. Weights Computation (for disproportionate sampling)

J. FGDs and Survey for Stakeholder Feedback Mechanism (SFM)

Focus Group Discussions. The FGDs will be administered to the LGUs through virtual meetings via Zoom, Google Meet, or other suitable online meeting platforms.



Survey for SFM through telephone interviews. PDI shall utilize the Telephone Interview Method as the default data collection method for administering the SFM survey questionnaire, wherein, PDI will use a secure, user-friendly, and web/browser-based software application in the conduct of the survey for all the respondent groups.

PDI will also seek the explicit, written consent of the respondents, at the beginning of every FGD or interview schedule. Should there be any requirement from GCG or SHFC to reveal the identity of the respondent with regard to their addresses or locations, they will be served as far as the consent given by the respondents will allow. If the respondents want to keep their locations/addresses confidential and detached from the survey results, this will be adhered to. Furthermore, information on the identity of respondents that can be disclosed to GCG and SHFC will only be limited to their addresses/locations.



VI. Data Analysis

The analysis of quantitative data will include the usage of descriptive statistics, including measures of central tendencies and variabilities. The Statistical Package for the Social Sciences (SPSS) will be primarily utilized for this study. Thematic analysis will be utilized for the qualitative data. Specifically, significant themes will be extracted from the FGD results, which will be further examined to determine key interest points generated from the participants.

A. Main CSS Administration

To answer the research questions, PDI will employ descriptive statistics and several cross-tabulations. Further, PDI shall particularly use the Statistical Package for the Social Sciences (IBM-SPSS) for data processing and analysis.

PDI shall present the results based on the **analysis plan** of the enumerated segments below, where feasible, and include these in the Final Report.

- By total
- By gender
- By age
- By civil status
- By highest educational attainment
- By position in the organization
- By number of years in the present position
- By customer type
 - Community Associations – Pre-takeout
 - Community Associations – Post-takeout
- By area (depending on the sample area coverage)
 - Total Luzon
 - Total Visayas
 - Total Mindanao
- By region or key city
- By type of service availed
- By rating
- Drivers of satisfaction (derived importance)



These demographic segments will only be read if the sample size allows or if sub-segments have a sample of at least 100. If the SHFC's total sample size would be less than 100, it can only be read at a total level.

B. FGD and Stakeholder Feedback Mechanism

Qualitative Data from the FGDs and the Feedback Survey Mechanism will be analyzed using thematic analysis.



VII. Time Frame & Payment Schedule

This project is intended to be undertaken over a period of four (4) months, to commence in August 2022 and end in December 2022. The timeline below assumes that:

1. The endorsement of the complete respondent list and feedback on decision points are given by SHFC no later than August 12, 2022 ; and
2. The endorsed respondent list shall be accurate and updated, i.e., contact persons and numbers indicated are correct.

ACTIVITY	DELIVERABLE/S	TIMEFRAME	PAYMENT SCHEDULE
Preliminaries	Inception Meeting Inception Report	14 July 2022	10% of the contract price
Pre-Test	Survey Instrument Stimulus Materials Pre-test Results Pre-test Report	September 2022	20% of the contract price
Training	Survey Instrument Stimulus Materials Training Manual Training Report		
Project Kick-off/ Start-off	Survey Instrument Stimulus Materials Observation Report Clearing/Debriefing Report	October 2022	30% of the contract price
Project Implementation	Supervision/Observation/Spot- Checking Report Fieldwork Progress Report	November 2022	30% of the contract price
Back-Checking & Spot-Checking	Back Checking/Spot-Checking Report		
Data Processing	Spot Checking Report for Data Processing Data Quality Control Report		
Analysis	Final Report	December 2022	10% of the contract price



**U502 OMM-CITRA BUILDING,
39 SAN MIGUEL AVE. ORTIGAS CENTER,
PASIG CITY 1605 PHILIPPINES
+632 8635 0016**

www.peopledynamics.ph



GOVERNANCE COMMISSION
3/F, BDO Towers Paseo, 8741 Paseo De Roxas, Makati City, Philippines 1226



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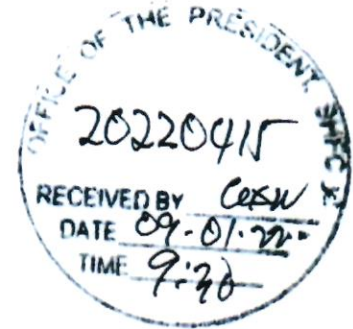
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30 August 2022

ATTY. ARNOLFO RICARDO B. CABLING
President

SOCIAL HOUSING FINANCE CORPORATION (SHFC)
BDO Plaza, 8737 Paseo de Roxas,
Salcedo Village, Makati City

RE : REQUEST FOR MODIFICATIONS ON SHFC's 2022
CUSTOMER SATISFACTION SURVEY (CSS)



Dear President Cabling,

This refers to the letter dated 20 July 2022¹ requesting for modifications/additions on the GCG prescribed Customer Satisfaction Survey (CSS) Questionnaire as follows:

- Changes in the terms used, from generic to specific and more appropriate terms (e.g. from "company" or "organization" to "homeowners association");
- Additional items in Part III, Execution of Service; and
- Inclusion of several items in the socio-demographic profile of the respondents that are relevant to Gender and Development (e.g. civil status, items on solo parents, persons with disabilities, and pregnant women, among others).

Part V of the Enhanced Standard Methodology on the Conduct of the Customer Satisfaction Survey² provides that "Questions under the Main Questionnaire are fixed and may not be altered, modified or deleted. GOCCs may only add service- or product- specific questions, under Execution of Service section, without the need to secure prior authorization from the GCG."

Foregoing considered, the Governance Commission confirms that the SHFC may undertake the modifications in the questionnaires as identified above. SHFC is reminded to strictly observe and ensure conformity to the provisions of the guidelines issued by the Governance Commission to prevent non-acceptance of the survey result.

FOR SHFC's INFORMATION AND COMPLIANCE.

Very truly yours,

ALEX L. QUIROZ
Chairperson

¹ Officially received by the Governance Commission on 25 July 2022.

² Accessible thru GCG website at <https://gcg.gov.ph/files/AHOUIPvpBfa8sod2t0d2.pdf>.

STRATEGIC MEASURE 3:
Improve Collection Efficiency
Rate

Signed Supporting Document

SOCIAL HOUSING FINANCE CORPORATION
Data Management Department - Finance and Comptrollership Group
COLLECTION EFFICIENCY RATING (CORPORATE)
AS OF SEPTEMBER 30, 2022

SM 3: Finance - Improve Collection Efficiency Rating of SHFC Loan Programs

COLLECTION, PhP	BILLING, PhP	CER
10,315,580,447	11,236,042,008	91.81%

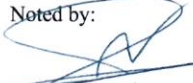
2022 Target: 91% Modified CER

Prepared by:



ARBEN D. PANDAC
SAS/OIC
Data Management

Noted by:



DANTE M. ANABE
OIC-Vice President
Finance & Comptrollership Group



SOCIAL HOUSING FINANCE CORPORATION
Kaagapay ng Komunidad sa Maginhawang Pamumuhay



MODIFIED CUMULATIVE CER with AGEING
AS OF SEPTEMBER 30, 2022

Accounts: Fully paid to 60 mos.

SEQ	AGE CATEGORY (Months in Arrears)	No. of MBs	%	LOAN AMOUNT	MONTHLY PRIN+INT	PRINCIPAL BALANCE	ARREARAGES							CUMULATIVE (w/o penalties)			CUMULATIVE (w/ penalties)		
							PRINCIPAL DUE	INTEREST DUE	MRI DUE	FIRE DUE	IUP DUE	PENALTY DUE	TOTAL DUE	BILLING	COLLECTION	CER	BILLING	COLLECTION	CER
1	Fully Paid	94,000	42.41%	3,682,075,824.21	24,275,720.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5,718,249,601.58	5,718,249,601.58	100.00	7,097,867,036.22	7,097,867,036.22	100.00
Current																			
2	0	27,571	12.44%	2,008,052,435.51	12,484,895.95	1,488,635,561.80	-2,475.67	-265.56	394,325.24	0.00	4,338.94	515,579.84	911,502.79	1,307,623,668.47	1,307,232,084.46	99.97	1,404,176,974.03	1,403,265,471.24	99.94
3	>0-3	17,351	7.83%	1,160,893,168.95	7,286,051.01	775,161,608.14	5,889,197.11	3,333,194.07	3,703,893.55	20,571.14	329,188.65	4,743,832.78	18,019,877.30	871,345,318.05	858,398,462.18	98.51	983,050,987.62	965,031,110.32	98.17
Sub-total Delinquent		44,922	20.27%	3,168,945,604.46	19,770,946.96	2,263,797,169.94	5,886,721.44	3,332,928.51	4,098,218.79	20,571.14	333,527.59	5,259,412.62	18,931,380.09	2,178,968,986.52	2,165,630,546.64	99.39	2,387,227,961.65	2,368,296,581.56	99.21
4	>3-6	9,277	4.19%	672,113,096.19	3,895,088.46	530,618,160.02	10,013,497.01	7,468,330.90	1,392,258.21	13,429.67	443,179.88	1,503,224.51	20,833,920.18	386,173,030.89	367,285,515.10	95.11	435,188,012.32	414,354,092.14	95.21
5	>6-12	12,556	5.66%	991,313,493.90	5,610,328.94	815,971,288.33	27,266,965.19	22,868,717.76	2,773,708.66	72,487.62	1,483,583.54	3,270,464.67	57,735,927.44	542,163,577.34	489,181,698.11	90.23	623,778,741.96	566,042,814.52	90.74
6	>12-24	18,811	8.49%	1,610,657,686.78	8,921,426.25	1,423,029,586.37	66,645,339.65	91,981,241.46	6,811,037.91	186,345.30	4,324,471.74	13,711,980.98	183,660,417.04	753,376,682.50	587,752,718.18	78.02	883,283,452.85	699,623,035.81	79.21
7	>24-36	18,747	8.46%	1,387,148,657.03	8,323,959.48	1,240,944,870.30	94,505,199.47	152,305,481.27	12,430,148.82	287,924.69	7,443,956.22	38,319,511.97	305,292,222.44	714,696,197.44	455,167,443.19	63.69	863,047,893.75	557,755,671.31	64.63
8	>36-48	10,893	4.91%	739,264,089.89	4,422,348.16	653,799,412.28	77,621,507.29	105,954,729.38	8,877,607.00	168,662.60	7,945,962.84	35,789,604.58	236,358,073.69	478,314,258.92	285,691,752.65	59.73	604,634,994.55	368,276,920.86	60.91
9	>48-60	8,141	3.67%	487,221,116.45	3,028,189.41	428,874,277.63	75,112,224.97	91,141,712.47	7,755,356.59	21,901.10	9,897,715.20	41,697,000.93	225,625,911.26	380,916,503.16	206,885,308.03	54.31	504,446,230.27	278,820,319.01	55.27
10	>60-UP	0	0.00%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	#DIV/0!	0.00	0.00	#DIV/0!
Sub-total		78,425	35.38%	5,887,718,140.24	34,201,340.70	5,093,237,594.93	351,164,733.58	471,720,213.24	40,040,117.19	750,750.98	31,538,869.42	134,291,787.64	1,029,506,472.05	3,255,640,250.25	2,391,964,435.26	73.47	3,914,379,325.70	2,884,872,853.65	73.70
11	HDH (uncategorized**)	4,297	1.94%	1,595,315,793.40		1,595,315,793.40								83,183,169.34	39,735,863.61	47.77	83,183,169.34	39,735,863.61	47.77
Total Considered in CER		221,644	100.00%	12,738,739,568.90	78,248,008.23	7,357,034,764.87	357,051,455.02	475,053,141.75	44,138,335.98	771,322.12	31,872,397.01	139,551,200.26	1,048,437,852.14	11,236,042,007.69	10,315,580,447.09	91.81	13,482,657,492.91	12,390,772,335.04	91.90
CORPORATE CER														11,236,042,007.69	10,315,580,447.09	91.81			

** individual ledger not yet available

Prepared by:

ARBEN D. PANDAC
Supervising Accounts Specialist

Noted by:

DANTE M. ANABE
OIC-VP, Finance & Comptrollership

0.00 0.00

STRATEGIC MEASURE 4:

Improve Status of Problematic Accounts

Signed Supporting Document

SOCIAL HOUSING FINANCE CORPORATION
Finance and Comptrollership Department

SM 4: STATUS OF PROBLEMATIC ACCOUNTS
As of September 30, 2022

Problematic Accounts	No. of Accounts
a. Prior Year No. of Accounts (2021)	108,551
b. Less: Improved during the year (2022)	<u>4,625</u>
c. Balance	103,926
d. Add: Problematic during the year	<u>7,949</u>
e. Problematic as at Q3 (2022)	111,875
Increase/(Decrease) [e - a]	3,324
Percent of Increase/-Decrease	3.06%

Prepared by:



ARBEN D. PANDAC

SAS/OIC, DMD

Noted by:



DANTE M. ANABE

OIC-VP, FCD

STRATEGIC MEASURE 5:

Increase Gross Revenue

Signed Supporting Document



Kaagapay ng Komunidad sa Maginhawang Pamumuhay

SOCIAL HOUSING FINANCE CORPORATION
Corporate Accounting Department - Finance and Comptrollership Group

GROSS REVENUE

As of SEPTEMBER 30, 2022
(In Philippine Peso)

Income	
Service and Business Income	458,309,104.48
Financial Income	7,413,100.91
Total Income	465,722,205.39

Summary:

GROSS REVENUE (As of SEPTEMBER 2022) 465,722,205.39

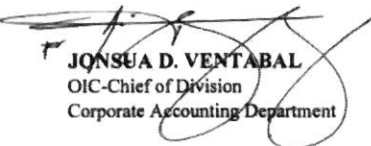
2022 CORPORATE TARGET 1,147,000,000.00

Variance Over Target (681,277,794.61)

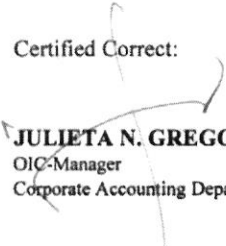
Note:

For CY 2022, the Corporate Target for SM 5 (Increase Gross Revenues) is 40.60% achieved.

Prepared by:


JONSUA D. VENTABAL
OIC-Chief of Division
Corporate Accounting Department

Certified Correct:


JULIETA N. GREGORIO
OIC-Manager
Corporate Accounting Department

Noted by:


DANTE M. ANABE
OIC-Vice President
Finance & Comptrollership Group

STRATEGIC MEASURE 6:

Budget Utilization Rate

Signed Supporting Document

SOCIAL HOUSING FINANCE CORPORATION
BUDGET UTILIZATION REPORT
AS OF SEPTEMBER 30, 2022

	<u><i>Board approved COB</i></u>	<u><i>DBM Approved COB</i></u>	<u><i>Obligation</i></u>	<u><i>Disbursement</i></u>
Maintenance and Other Operating Expenses	1,158,110,280.20	834,713,000.00	132,352,125.33	132,347,258.68
Capital Outlay	122,821,385.09	55,282,000.00	15,375,214.59	15,094,818.39
Loans Outlay	5,969,352,892.00	3,300,685,000.00	1,249,879,604.12	996,027,452.68
Total	7,250,284,557.29	4,190,680,000.00	1,397,606,944.04	1,143,469,529.76

Obligations BUR

Total Obligations/DBM-Approved COB 33%

Disbursements BUR

Total Disbursements/Total Obligations 82%

Total Disbursements/DBM Approved COB 27%

Prepared by:


JASMIN V. LUYUN

OIC-Manager

Budget and Expense Management Division

Certified Correct by:


DANTE M. ANABE

OIC-Vice President

Finance and Comptrollership Department

STRATEGIC MEASURE 8:
Enhance Support Systems for
the Effective and Efficient
Processes

Signed Supporting Document



ACCOMPLISHMENT REPORT

Group/Department: **INFORMATION COMMUNICATION TECHNOLOGY DIVISION**
September 2022 Accomplishment Report

Group/Departmental Activities (as stated in your DAP)	Group/Departmental Committed KPIs (as stated in your DAP)	Actual Accomplishment/s vs Committed KPIs	Reasons for over achieving targets (please cite specific reasons/activities in exceeding the target at least more than 20%)	Reasons for not achieving 90% of the targets (please cite specific issues/concerns that hindered achievement of the target)	Proposed/Revised KPIs and Strategies (for targets that were not met - at least 90%)
- Secure the approval of DICT on Information System Strategic Plan (ISSP) 2022 - 2024	100% Approved ISSP 2022- 2024 by DICT	- DICT emailed the signed SHFC ISSP 2022-2024 Evaluation Form on September 21, 2022			
- Analysis and development of the following modules: • Performance Monitoring System • Incident Handling System • Remedial Management System • Human Resource Information System	100% Completion of the development which includes the following: • Training • Implementation • Support/Maintenance	- 90% Completed - Presentation to ICTD last September 05, 2022 - 90% Completed - Presentation to ICTD last September 05, 2022 - Ongoing system analysis and 70% mock up design - Initial module implemented for collection support - Ongoing system analysis and 70% mock up design - Gathering data for enhancement last September 13, 2022			
Assist and resolve IT related issues concern of SHFC users on attaining their targets	Maintain and supports IT hardware and software of all departments.	100% Supported and fixed 3159 IT related issues as of September 31, 2022 378 issues for the month of September which included the following: - Maintenance - 48 - Documentation - 19 - End User Support - 169 - Network Problem - 16 - Printer Problem - 58 - Internet Access Request - 68	Immediate action on the issues encountered by SHFC users. And preventive maintenance service was already done by technical supports to minimize IT related issues.		
Coordinate with the vendor(s) for the renewal of IT related License subscription	100% Renewal of the following - Internet Connectivity - Firewall Licenses - Secure Sockets Layer (SSL) - Domain Name	- Renewed the Internet connectivity last January 22, 2022 (PT&T) - Renewed Firewall Licenses - Renewed SSL last February 19, 2021 - Renewed DNS last July 19, 2022	Proactive actions of the personnel to avoid future issues on internet and network security		
Participate in cascading the relevance of securing a Re-certification on ISO for organizational processes Comply with ISO QMS standards	100% Completion to ISO QMS or no major NC or numerous NCs resulting to major NC	Cascading of the information to the staff in preparation for the audit			
Attend and participate in trainings to improve IT personnel competency	All ICTD employees attended one (1) internal or external training	- GPBB Training attended by Joselito A. Cada, Gerard Allan Peralta, Nathaniel Castaritas on September 12-16, 2022 - Anti-Sexual harassment Act and Safe Spaces Act attended by Raymund Barameda, Joselito Cada, Gerard Allan Peralta, Robby Jed Cruz on September 22-23, 2022 and Rhett Veloso on September 27, 2022 - DICT Digital Literacy Training attended by Joselito A. Cada on September 29, 2022			

Prepared by:

Crispiano R. Alarcon
Technical Staff II

Checked by:

Joselito A. Cada
Division Chief III

Approved by:

Crispiano R. Alarcon
Manager




Kaagapay ng Komunidad sa Maginhawang Pamumuhay



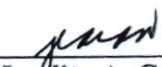
INFORMATION COMMUNICATION TECHNOLOGY DIVISION (ICTD)
Information System Strategic Plan (ISSP)
GCG Target – Phase I
As of September 2022

ZEUS Program	Actual Accomplishment	% Of Completion
Performance Monitoring System	- Coding and Integration - Unit Testing	80%
Incident Handling System	- Coding and Integration - Unit Testing	80%
Human Resource Information System	- Planning and Elicitation - System Analysis and Design	50%
Remedial Management System	- Planning and Elicitation - System Analysis and Design	50%

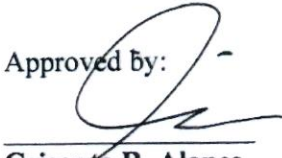
Prepared by:


Crismanilet G. Alegre
Technical Staff II

Checked by:


Joselito A. Cada
Division Chief III

Approved by:


Crisanto R. Alanes
Manager