

TERMS OF REFERENCE (TOR)

DOCUMENT DIGITIZATION SERVICES PHASE III FOR THE CITY CIVIL REGISTRY DEPARTMENT (CCRD) OF QUEZON CITY

I. RATIONALE AND BRIEF BACKGROUND

The Local Government of Quezon City aims to procure **DOCUMENT DIGITIZATION SERVICES PHASE III FOR THE CITY CIVIL REGISTRY DEPARTMENT (CCRD) OF QUEZON CITY**. The project shall continue the digital archiving lifecycle of valuable civil registry documents that includes the digitization (scanning and publishing), uploading (indexing and storing), encoding, archiving, retrieval, reporting, and preservation of all documents from small to large formats and multiple relational documents using the existing Digital Archiving System of Civil Registry Department - CRISPR.

This project is strategic for the **Birth Registration Online Portal** in **QC eServices**. The said portal is processing **Certified True Copy (CTC) requests**, and by digitizing and archiving the valuable civil registry documents, the CTC requests will be handled and processed efficiently. It is also a vital component for the **CIVIL REGISTRY INFORMATION SYSTEM PROJECT TECHNOLOGY REFRESH (CRISPR)** project.

There are four (4) phases of the implementation of the Project namely:

1. Scanning of new documents
 - a. Birth Certificates – 2022
 - b. Marriage Certificates – 2021, 2022
 - c. Death Certificates – 2021, 2022
 - d. Late Registration (Birth)
 - e. Marriage Licenses
2. Evaluation of scanned documents
3. Encoding of scanned and evaluated documents
4. Production and uploading of documents

The Project also features workflow for the management of confidential and non-confidential documents.

II. PROJECT DESCRIPTION

The completion of the project, which included evaluation, encoding and uploading of newly scanned documents, will ensure **FIVE HUNDRED THOUSAND (500,000)** sets of documents of the Office of the **CITY CIVIL REGISTRY DEPARTMENT**.

III. PROJECT SCOPE OF WORK

The project shall cover the full digitization services for the newly scanned documents of Civil Registry Department of the Local Government of Quezon City, which includes but not limited to the following:

DIGITIZATION SERVICES, ENCODING AND UPLOADING TO SYSTEM OF NEWLY SCANNED DOCUMENTS

- Organization of Records and documents
- Grooming of documents
- Scanning Process

- Publishing in PDF format
- Evaluation of Records and Digitized Documents
- Uploading of Digitized File to CRISPR
- Encoding of Records Information to CRISPR Database
- Revision Control of Files and Databases to ensure that corrupted and duplicate files and records are replaced with valid files and records

DEVELOPMENT OF A BACKUP SYSTEM

- Three copies of back up (2 servers, 1 portable storage)
- Production application, File and database server
- Staging server for Application, File and Database
- Monthly Full Backup of Scanned Digitized Document
- Regular Weekly incremental and changes to backup of Scanned Documents

IV. AREA OF COVERAGE

The six (6) features of the managed services of the project that are essential to the success of the project shall be instituted in the Civil Registry Department of the Local Government of Quezon City. The technical and functional features will all be established within the compounds of the department. The features are as follows:

1. STAGING AND PRODUCTION SERVERS FOR APPLICATION, DATABASE AND FILES

- Staging servers will handle all newly scanned documents prior to the 3-stage evaluation process;
- Production will always be assumed all in order and clear of invalid scanned docs and data; and
- 3 sets of copies of scanned documents that will be distributed to servers with one alpha copy that will be secured of its integrity.

2. ELEVEN (11) STEPS DIGITIZATION PROCESS

- Organizing, grooming, and distributing of documents for scanning;
- Scanning and uploading to file server;
- Evaluation process of scanned documents;
- Encoding and uploading to CRISPR;
- Indexing of scanned documents;
- Encryption of scanned documents for backup purposes; and
- Post processing of documents.
- Return of scanned docs in original state and location
- Labeling of scanned documents as “scanned”
- Reporting of damaged documents
- Logging of scanned documents

3. OPTICAL CHARACTER RECOGNITION – This will reduce encoding activities and encoding related issues. The OCR shall ensure that the characteristics of the characters are recognizable.

- Layout analysis
- Line and word detection

4. THREE STAGE EVALUATION OF SCANNED DOCUMENTS – this is the Quality control stage of the project. This will filter newly scanned documents and data to the production servers.

- Pre-evaluation checklist – duplicates, resolution, clarity and completion check of all markings.
- Evaluation – side by side evaluation and validation of digitized copy and actual document.
- Post evaluation – validation of encoded information and document metadata. Promotion of digitized copy and its relevant data to the production servers.

5. ENCRYPTION AND DECRYPTION OF BACKUP COPIES OF SCANNED DOCUMENTS – this is to ensure that all documents will be safe once it is uploaded to the server.

6. ORGANIZATION OF ORIGINAL/BASE AND ANNOTATED DOCUMENTS – this project will assign links on documents that are related.

V. PROJECT OBJECTIVES

The General Objective of the project is to continue the digital archiving of documents of **CITY CIVIL REGISTRY DEPARTMENT** of Quezon City.

Specific Objectives are as follows:

- To provide managed services to organize, scan, upload and encode newly scanned documents.
- To complete the project with proper turnovers and training for the users upon completion of the project.
- To develop strategy for archiving and digitization for the prioritization of records and documents of the Civil Registry Department

VI. PROJECT STANDARDS AND REQUIREMENTS

The requirements are expressed in indicative and functional terms to guide the Service Provider in the provision of services that will ensure the overall health of the system to include its performance, interoperability, integration, and information exchange.

1. BIDDERS REQUIRED STANDARDS/QUALIFICATIONS

- 1.1. The bidder/service provider shall submit, as part of its bid, a copy of its company profile and organizational structure.
- 1.2. The bidder/service provider should have implemented and completed an archiving project which includes Digitization of Civil Registry documents as required as similar project in nature with at least 50% of the ABC within the last three (3) years. The bidder/service provider must submit proof of project and completion.
- 1.3. The winning bidder must be of good standing and has satisfactory performance with respect to its latest completed project.

2. PROJECT SPECIFICATIONS

2.1 PROJECT MANAGEMENT

- Project Kick off
- Qualified Project Manager and Project Management Team
- Full Documentation on Project implementation
- Digitization, encoding and uploading services
- Organizing, housekeeping and grooming of civil registry documents
- Scanning and publishing documents
- Indexing, encoding and uploading in CRISPR
- Validation, evaluation and production of scanned documents
- Three (3) stage evaluation to ensure that raw scanned documents and its information is aligned and in proper order
- Ensure that the proper resolution and clarity standards are set in place
- Publication of scanned documents to production servers
- Post processing of scanned documents

2.2 BACK-UP AND RECOVERY SUPPORT

- Passive replication of database and scanned files
- Onsite and offsite full backup
- Daily and Weekly incremental backup
- On site recovery validation

2.3 WARRANTY, MAINTENANCE AND SUPPORT

- One (1) hour response time for critical issues for resolution within twenty-four (24) hours.
- 1-year coverage after full acceptance of project

3. PROJECT MANAGEMENT PLAN

3.1 Project Management

- a. Project Plan – the overall project planning includes project timelines and deliverables, systems design, development and deployment, training and handover, and documentation.
- b. Digitization and uploading of scanned documents
- c. Project Documentation
- d. Functional, Technical and User Trainings
- e. Warranty and Support Services
- f. Backup and Restore Procedure
- g. User Acceptance Testing

4. PROFESSIONAL SERVICES

The contractor/Service Provider/Bidder shall have the critical technical knowledge that includes knowledge of database systems; ability to manage database system integration, implementation, and testing; ability to manage relational databases and create complex reports; knowledge and ability to implement data and information policies, security requirements; and knowledge of client tools used by business users. The project should provide the following Professional Services:

- a. Project Manager - The Project Manager should have at least project management experience in digitization lifecycle.
- b. Systems Administrator (1) – System Administrators are for the installation and configuration of systems that includes operating systems, security systems, and backup systems. These administrators will provide support systems to assure continuous operation of the systems including all servers, storages, and software systems
- c. Facilities Support (2) – Provides technical support to assure all facilities including all scanners, workstations, network and peripherals are all in good condition.
- d. Digitization Experts (10) – These personnel are assigned for the regular format documents.
- e. Staff Aides (3) – These personnel will provide organizational housekeeping and grooming activities on the documents and other services needed for the completion of the digitization process.

VII. PROJECT DURATION

This project will commence immediately upon the receipt of Notice to Proceed (NTP) by the winning service provider for a period of forty-five (45) calendar days for the implementation or upon completion of the 500,000 set of documents with full acceptance whichever comes first, and one (1) year for maintenance and warranty.

Project duration is for a period of forty-five (45) calendar days from receipt of Notice to Proceed (NTP). The delivery schedule expressed as calendar days stipulates the project delivery date.

Item No.	Description	Delivered (Days)
1	Project kick-off: A detailed discussion on the process and limitation of the project.	Within 7 days upon receipt of NTP
2	Document Digitization (scanning, uploading, encoding and evaluation) Documentation and Knowledge Transfer / Training	Within 45 days upon receipt of NTP

VIII. BASIS FOR PAYMENT

The terms of payment shall be based on the following completed man-days:

Digitization fees shall be invoice after the completion of digitization process of 500,000 sets of documents on a period of forty-five (45) days whichever comes first provided that the vendor has submitted a summary of digitization services showing that they have rendered the stated number of digitized civil registry documents. Payment shall be subject to applicable taxes.

IX. APPROVED BUDGET FOR THE CONTRACT

The Approved Budget for this Contract (ABC) amounting to **Four Million Pesos (Php4,000,000.00)** VAT Inclusive.

COST DERIVATION

Scanning, evaluation, encoding, production and publishing of civil registry valuable documents:	3,695,000.00
Documentation (Professional Services):	<u>305,000.00</u>

TOTAL: **Php 4,000,000.00**

X. PENALTIES FOR BREACH OF CONTRACT

Failure to deliver the services according to standards and requirements set by the City shall constitute an offense and shall subject the Contractor to penalties and/or liquidated damages pursuant to RA 9184 and its revised Implementing Rules and Regulations.

XI. CANCELLATION OR TERMINATION OF CONTRACT

Should there be any dispute, controversy or difference between the parties arising out of this TOR, the parties herein shall exert efforts to amicably settle such dispute or difference. However, if any dispute, controversy or difference cannot be resolved by them amicably to the mutual satisfaction of parties, then the matter may be submitted for arbitration in accordance with existing laws, without prejudice for the aggrieved party to seek redress before a court of competent jurisdiction.

The guidelines contained in RA 9184 and its revised IRR shall be followed in the termination of any service contract. In the event the City terminated the contract due to default insolvency, or for cause, it may enter into negotiated procurement pursuant to section 53(d) of RA 9184 and it's IRR.

TECHNICAL WORKING GROUP:


ATTY. PAOLO CARLO B. BRILLANTES
Chief Administrative Officer

Approved by:


SALVADOR G. CARIÑO, JR.
Department Head

9/6/23

9/6/23