

*Terms of Reference (TOR)*  
**DIGITAL ARCHIVING AND TAX DECLARATION SCANNING SERVICES  
 FOR THE OFFICE OF THE CITY ASSESSOR, QUEZON CITY**

## **I. RATIONALE AND BRIEF BACKGROUND**

One of the component projects of the Real Property Information Systems (RPIS) submitted, considered as Real Property Tax Collection System Upgrading under the Local Development Investment Program (LDIP) is the Outsourced Scanning, Digitization and Cataloging of Assessment Documents. Assessment documents involve all records –Old Tax Declarations and other transaction documents, that needs to be digitized for an improved record maintenance, enhanced accessibility, systematic filing, and reduced physical storage, which are all part of our mandate, as provided for in Sec. 472 of RA 7160.

The Office of the City Assessor of Quezon City intends to engage the services of a third-party provider for the scanning and digitization of its Tax Declaration from D-series records in 1996 down to 1941 transactions. The said Tax Declarations are currently stored in hardbound books, making it challenging to retrieve and verify information swiftly. By transitioning to a digital format, the Office will significantly enhance operational efficiency and accessibility of TDs which are considered as permanent records of the Office, bolster document security, facilitate collaboration, and ensure the long-term preservation of related assessment information. This initiative will ultimately support the Office's mission and improve service delivery to stakeholders.

The project will involve engaging the services of a third-party provider with expertise in digitizing documents, which will handle the scanning, publishing, uploading, proper indexing and storing of digitized files in a secure and accessible digital format. The implementation of this digital archiving and tax declaration scanning services is expected to resolve the vulnerability issue on record handling, or the possible loss through disposal, decay and disaster, considering location.

## **II. PROJECT DESCRIPTION**

This project will involve the conversion of more or less One Million three hundred twenty-eight thousand (1,328,000) manually issued Tax Declarations and other assessment documents into electronic formats, inclusive of a customized Digital Archiving and Retrieval System.

### **Key components of the project include:**

#### **a. Scanning and Publishing**

- Physical copies of manually issued Tax Declarations will be scanned using high-quality scanning equipment with at least 600 DPI Resolution to create digital copies, which will be processed and published in a PDF format.

#### **b. Uploading and Indexing**

- The digitized documents will be uploaded to a Digital Archiving and Retrieval System to be provided by the Service Provider. Each document will be organized by applicable file naming convention as follows, to enable efficient search and retrieval capabilities, to wit:
  - Tax Declaration Number (TDN)
  - Property Index Number (PIN) old or short PI
  - Owner's Name (structure to be defined further)
  - Transfer Certificate of Title/Condominium Certificate of Title (TCT/CC'T)
  - Previous Tax Declaration Number (PVTDN)

#### **c. Storage**

- The digital documents will be securely stored within the Office of the City Assessor's assigned server, utilizing appropriate storage infrastructure. Security measures will be implemented to protect sensitive information.

The completion of the project, which includes scanning, publishing, uploading, proper indexing, storage and systematic retrieval of scanned documents, will involve a total of **Two Million Six Hundred Fifty-Six Thousand (2,656,000)** pages as indicated below:

Type	Series	Year Covered	No. of Books	No. of TDs	Book Color/Size
Small Books	D Series Revision (Manual TDs)	1996/1997	1,350	675,000	Red (11.5"x8.5"x2.5")
	PD Series	1974	307	153,500	Red (11.5"x8.5"x2.5")
Big Books	PD Series	1974	156	78,000	Dark Blue Big (14.5" x 11.5"x2.5")
	New Series	1960 to 1973	598	300,500	Blue Big (14.5" x 11.5"x2.5")
	Old Series	1941 to 1959	242	121,000	Gold Big (14.5" x 11.5"x2.5")
Total No. of TDs - - - -				1,328,000	2 pages each =2,656,000

The scanning equipment required for this project are provided and owned by the service provider. This ensures that the project is executed using the latest technology and equipment without any additional burden on the part of the Office’s resources. The service provider will handle all aspects of scanning, publishing, uploading, proper indexing and storing of digitized files in a secure and accessible digital format, ensuring a seamless and efficient transition from physical to digital formats.

**III. PROJECT SCOPE OF WORK**

The digitization services for this project encompass a comprehensive set of tasks designed to ensure a smooth and efficient conversion of physical documents into digital formats:

1. Document Preparation - Organize and prepare Tax Declarations (TDs) for scanning by ensuring they are properly groomed, free of obstructions, and ready for the digitization process.
2. Digital Conversion - Utilize high-quality scanning equipment to convert documents into digital format, ensuring that the resulting PDF files are clear, legible, and accurately reflect the original documents.
3. File Uploading - Upload the digitized files to the Digital Archiving and Retrieval System provided by the service provider. Ensure files are named according to a standardized naming convention and are organized systematically to facilitate easy retrieval and accessibility.
4. Data Encoding - Input essential document information into a database to enhance accessibility and searchability. Key data to be encoded includes Tax Declaration Number (TDN), Property Identification Number (PIN), Owner’s Name, Title Certificate Number (TCT)/Condominium Certificate of Title Number (CCT), and Previous TD Number.
5. Backup Development - Develop and maintain a robust backup system, performing daily and monthly backups to ensure data integrity, security, and availability. Ensure backups are stored in a secure location and are easily retrievable if needed.
6. QR Code Generation and Assignment - Generate and assign a unique QR Code to each scanned TD. Embed the QR Code into the respective document upon printing. Ensure that each QR Code links accurately to the corresponding digital document and associated data for quick and reliable access.

This comprehensive approach will ensure a thorough and efficient digitization process, resulting in a well-organized and secure digital archive.

**IV. PROJECT STANDARDS AND REQUIREMENTS**

The requirements are expressed in indicative and functional terms to guide the Service Provider in the provision of services.

**1. BIDDERS REQUIRED STANDARDS/QUALIFICATIONS**

**A. Track Record**

- 1) The Service Provider must be in the same industry as per SEC registration or DTI filing for at least five (5) years;
- 2) The Service Provider must have implemented and completed a digitization project within the last three (3) years;

- 3) The Service Provider should have implemented a public or private project with a single completed contract amounting to at least fifty percent (50%) of the ABC.

**B. Organization**

- 1) Service Provider must have a Platinum status in PhilGEPS.
- 2) The Service Provider must be a duly registered company with SEC or DTI filing.
- ✓ 3) The Service Provider must be duly registered under National Privacy Commission.
- ✓ 4) The Service Provider shall guarantee that the services to be provided shall abide with the DATA PRIVACY ACT OF 2012 to ensure that the personal information is protected.

**C. Manpower**

Professional Services Required for the Project:

- ✓ 1) Project Manager (1):
  - a. Qualifications: The Project Manager should have substantial experience in managing digitization projects. This includes overseeing project timelines, budgets, and resources to ensure successful project delivery.
  - b. Responsibilities: Lead the project, coordinate between teams, manage risks, and ensure that project goals are met efficiently and effectively.
- ✓ 2) Systems Administrator (1):
  - a. Qualifications: The Systems Administrator should have expertise in the installation, configuration, and maintenance of operating systems, backup systems, and servers.
  - b. Responsibilities: Provide technical support for continuous system operation, manage server and storage performance, and ensure all software and hardware requirements are met.
- ✓ 3) Facilities Support (1):
  - a. Qualifications: The Facilities Support specialist should have experience in maintaining technical equipment and facilities.
  - b. Responsibilities: Ensure that all scanning equipment, workstations, network infrastructure, and peripherals are in optimal working condition. Provide troubleshooting and maintenance support to prevent downtime.
- ✓ 4) Digitization Staff (10):
  - a. Qualifications: The Digitization Staff should have experience in document scanning, data entry, and information encoding.
  - b. Responsibilities: Perform scanning tasks, manage the grooming of documents, and accurately encode primary information into the system. Ensure the integrity and quality of digitized data.

**D. Server Requirements**

The server and database requirements below shall be provided by the Office of the City Assessor.

Server Requirements	<ul style="list-style-type: none"><li>• Must operate on Windows Server 2019 or higher;</li><li>• Storage should have at least 6TB for digital file storage and database and with expandable slots for future upgrades;</li><li>• Server must also have a backup storage of at least another 6TB for database backup and files.</li></ul>
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## V. PROJECT DURATION

The total project duration is upon issuance of Notice to Proceed until December 31, 2025, or until the project's completion, whichever comes first. It is assured that the project will be carefully managed to ensure timely completion and adherence to project goals.

## VI. APPROVED BUDGET FOR THE CONTRACT

The Total Approved Budget for this Contract (ABC) as a component of the Office's RPIS project under the Local Development Investment Program (LDIP) amounts **Ten Million, Nine Hundred Sixty-Five Thousand Pesos Only (10,965,000.00)**

### COST COMPOSITION

- a) Digitization of a total of 1,657,000 pages of TDs in good condition documents (*Using Highspeed Duplex Scanner*)
- b) Digitization of a total of 999,000 pages of TDs in deteriorated or fragile Condition documents (*Using Overhead Image Scanner*)

Managed Services	Activities
Scanner Calibration	<ul style="list-style-type: none"><li>○ Tune, correct, and configure both high-end and low-end scanners.</li><li>○ Execute diagnostic systems to verify the health of all scanner components.</li></ul>
Organization, Tagging and Grooming	<ul style="list-style-type: none"><li>○ Perform document housekeeping, including buffing and untangling tapes and staple wires.</li><li>○ Repair and address signs of wear and tear on documents.</li></ul>
Scanning of Documents	<ul style="list-style-type: none"><li>○ Digitize tax declarations using regular scanners with feeders.</li><li>○ Scan deteriorated or fragile documents using overhead image scanners to minimize damage.</li></ul>
Digital Formatting and Conversion of documents	<ul style="list-style-type: none"><li>○ Convert digitized images into PDF format.</li></ul>
Image Correction	<ul style="list-style-type: none"><li>○ Enhance digitized documents by removing spots, scratches, stains, and smudges.</li><li>○ Correct unwanted color stains and ensure clarity.</li></ul>
Indexing and uploading	<ul style="list-style-type: none"><li>○ Upload digitized documents to the Digital Archiving and Retrieval System.</li></ul>
Quality Assurance (Validation) of Scan Documents and Uploaded documents in the File Server	<ul style="list-style-type: none"><li>○ Validate and confirm the integrity and readability of all scanned documents.</li><li>○ Re-scan and re-publish documents if there are issues with information or image integrity.</li></ul>
Backup of Scanned Documents	<ul style="list-style-type: none"><li>○ Perform daily backups of scanned documents to ensure data recovery in case of disaster.</li></ul>

## **VII. BASIS FOR PAYMENT**

A one-time payment shall be issued upon the successful completion of the following tasks related to the TD-series: digitization, which includes scanning, publishing, uploading, indexing, and storing. The final payment will be calculated based on the actual and corresponding costs incurred, determined by the precise number of TD pages processed.

## **VIII. PENALTIES FOR BREACH OF CONTRACT**

Failure to deliver the services according to the 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.

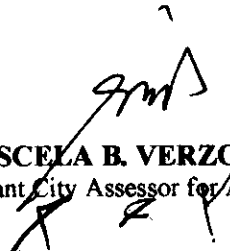
## **IX. CANCELLATION OR TERMINATION OF CONTRACT**

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 negotiated procurement pursuant to RA 9184 and its IRR.

NOTED BY:

  
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*SRC/phv/10/16/2024 I.DIP ScanningTOR*