SUPPLEMENTAL/BID BULLETIN (SBB) NO. 1

This SBB No. 1 dated October 20, 2023 for **Project ID No. DBM-2024-03, "Managed Services for the Development of Microservices for the Budget and Management of the Department of Budget and Management (DBM),"** is issued pursuant to Section 22.5 of the 2016 Revised Implementing Rules and Regulations of Republic Act No. 9184, to clarify, modify or amend items in the Bidding Documents. Accordingly, this shall form an integral part of the Bidding Documents.

PARTICULARS			AMENDMENTS/CLARIFICATIONS		
Eligibility Data Sheet			**Eligibility Data Sheet**		
Eligibility Documents			**Eligibility Documents**		
	xxx			xxx	
9.1	Similar contracts shall refer to the design, development, configuration, deployment, and implementation of a solution, system, or platform utilizing or applying the microservices architecture approach. The solutions developed and deployed should be related to financial management or information management systems.		9.1	Similar contracts shall refer to the design, development, configuration, deployment, and implementation of a solution, system, or platform utilizing or applying the microservices architecture approach. The solutions developed and deployed should be related to financial management, ~~or~~ information management systems, **OR CONTRACTS USING, ADOPTING, AND DEPLOYING LOW-CODE FRONTEND AND ROBOTIC AUTOMATION TOOLS.**	

9.2	xxx					9.2	xxx				

No.	Evaluation Criteria	Max Score
	xxx	
1.2	**With prior Technology related awards**	
	• More than 20 technology related awards received from 2000 – 2003	

No.	Evaluation Criteria	Max Score
	xxx	
1.2	**With prior Technology related awards**	
	• More than ~~20~~ **10 FIRM PERFOR-MANCE OR** technology related awards **AND/OR**	

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<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>RECOGNI-TIONS received from 2000 - 2003</td><td></td></tr>
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		• With 11 – 20 technology related awards received from 2000 – 2023				• With 11 – 20 **6 – 10 FIRM PERFOR-MANCE OR** technology related awards **AND/OR RECOGNI-TIONS** received from 2000 – 2023	
		• With 10 technology related awards received from 2000 – 2003				• With 10 **5 FIRM PERFOR-MANCE OR** technology related awards **AND/OR RECOGNI-TIONS** received from 2000 - 2003	
	xxx				xxx		
	2.1	**Technical Lead***			2.1	**Technical Lead***	
	xxx				xxx		
	2.2	**Agile Technical Lead***			2.2	**Agile Technical Lead***	
	xxx				xxx		
	2.3	**API Developer***			2.3	**API Developer***	
	xxx				xxx		
	2.4	**Front End Developer***			2.4	**Front End Developer***	
	xxx				xxx		
	2.5	**Back End Developer***			2.5	**Back End Developer***	
	xxx				xxx		
	2.6	**Quality Assurance (QA) Tester***			2.6	**Quality Assurance (QA) Tester***	
	xxx				xxx		
	2.7	**Network/ System Administrator***			2.7	**Network/ System Administrator***	
	xxx				xxx		
	3.1	With existing practicing Technical IT professionals based			3.1	With existing practicing Technical IT professionals based	

	on the firm's Human Resource Certified Documents **			on the firm's Human Resource Certified Documents **	
	xxx			xxx	
3.2	Work Commitment		3.2	Work Commitment*	
	xxx			xxx	

* For bids with more than the required number per personnel, the scores will be averaged
** IT Firms with no ongoing projects will automatically get the maximum points.

~~* For bids with more than the required number per personnel, the scores will be averaged~~
** IT Firms with no ongoing projects will automatically get the maximum points.

xxx

xxx

Bid Data Sheet

Bid Data Sheet

ITB Clause	
	xxx
10.2	In addition to the TPFs mentioned, the shortlisted Consultants shall submit the following: TPF 10 – Statement of all Government and Private Contracts Completed; and TPF 11 – List of all Ongoing Government and Private Contracts Including Contracts Awarded but no yet Started TPF 12 – Statement of Consultant's Nationality
	xxx

ITB Clause	
	xxx
~~10.2~~	~~In addition to the TPFs mentioned, the shortlisted Consultants shall submit the following:~~ ~~TPF 10 – Statement of all Government and Private Contracts Completed; and~~ ~~TPF 11 – List of all Ongoing Government and Private Contracts Including Contracts Awarded but no yet Started~~ ~~TPF 12 – Statement of Consultant's Nationality~~
	xxx

25.3 — xxx

Criteria	SCORE
xxx	
II. Applicable Experience of the Firm	**30**
xxx	
B. With prior experience on proposed solution must be in the Gartner's Leaders Quadrant	

25.3 — xxx

Criteria	SCORE
xxx	
II. Applicable Experience of the Firm	**30**
xxx	
~~**B. With prior experience on proposed solution must be in the Gartner's Leaders Quadrant**~~	

	With more than 11 consecutive years in the leader's quadrant based on the latest Gartner Magic Quadrant report				~~With more than 11 consecutive years in the leader's quadrant based on the latest Gartner Magic Quadrant report~~	
	With 6 – 10 consecutive years in the leader's quadrant based on the latest Gartner Magic Quadrant report				~~With 6 – 10 consecutive years in the leader's quadrant based on the latest Gartner Magic Quadrant report~~	
	With at least 5 consecutive years in the leader's quadrant based on the latest Gartner Magic Quadrant report				~~With at least 5 consecutive years in the leader's quadrant based on the latest Gartner Magic Quadrant report~~	
	C. With prior technology - related awards				~~C.~~ **B. With prior technology - related awards**	
	More than 20 technology-related awards received from year 2000 to 2023				More than ~~20~~ **10 FIRM PERFORMANCE OR** technology related awards **AND/OR RECOGNITIONS** received from 2000 - 2003	
	With 11 – 20 technology-related awards received from year 2000 to 2023				With ~~11 – 20~~ **6 – 10 FIRM PERFOR-MANCE OR** technology related awards **AND/OR RECOGNITIONS** received from 2000 – 2023	
	With 10 technology-related awards received from year 2000 to 2023				With ~~10~~ **5 FIRM PERFORMANCE OR** technology related awards **AND/OR RECOGNITIONS** received from 2000 - 2003	
	xxx				xxx	
xxx						

Section VI. Terms of Reference

xxx

Section VI. Terms of Reference (REVISED)

xxx

Scope of Work	4. Scope of Work
xxx	xxx
4.1 Analysis of Existing Budget Management System	**4.1 Analysis of Existing Budget Management System**
• Shall conduct a comprehensive assessment of the existing systems specifically the following: xxx • Must identify strengths, weaknesses, and areas for improvement. • Improvement of the systems must be readily available for seamless data exchange between other systems for an Application Programming Interface (API). • Propose system enhancements based on the assessment findings and stakeholder requirements. • Prioritize enhancements that improve data accuracy, reporting capabilities, and user experience	**4.1.1** Shall conduct a comprehensive Analysis of the existing systems specifically the following: xxx **4.1.2** Must identify strengths, weaknesses, and areas for improvement. **4.1.3** Improvement of the systems must be readily available for seamless data exchange between other systems for an Application Programming Interface (API). **4.1.4** Propose system enhancements based on the assessment findings and stakeholder requirements. **4.1.5** Prioritize enhancements that improve data accuracy, reporting capabilities, and user experience. **4.2 CONDUCT OF DESIGN THINKING WORKSHOPS** **4.2.1** CONDUCT DESIGN THINKING WORKSHOPS TO UNDERSTAND THE BUDGET MANAGEMENT CYCLE BASED ON THE USER PERSPECTIVE. **4.2.2** MUST DOCUMENT THE OUTPUT OF THE DESIGN THINKING WORKSHOPS AND IDENTIFY THE FOLLOWING: **4.2.2.1** PAIN POINTS, GAPS AND OPPORTUNITIES FOR IMPROVEMENT. **4.2.2.2** PROPOSE ENHANCEMENTS BASED ON THE ASSESSMENT FINDINGS AND STAKEHOLDER REQUIREMENTS. **4.2.3** THE NUMBER OF DESIGN THINKING WORKSHOPS WILL DEPEND ON THE NEEDS AS

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4.2 Flexible Reporting Dashboard for National Expenditure Program (NEP), Government-owned and Controlled Corporation (GOCC) and Budget of Expenditures and Sources of Financing (BESF)

- Must collaborate with stakeholders to gather and document detailed requirements for the reporting dashboard.
- Design a user-friendly interface for the reporting dashboard
- Develop a customizable widgets and visualization of the components
- Must secure and implement data integration and connection to relevant databases
- Flexible framework for users to customize the layout, content and appearance of the dashboards
- Must be able to produce interactive and accurate visual reports showcasing spending patterns, income trends, and goal progress that can provide insights and recommendations based on data analysis
- Shall incorporate data analysis and visualization tools to provide accurate and meaning reporting insights
- Ensure testing, functionality, security and performance prior to the deployment of the dashboard

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DETERMINED BY THE SERVICE PROVIDER AND THE DBM.

~~4.2~~ **4.3 DEVELOPMENT OF** Flexible Reporting Dashboard for National Expenditure Program (NEP), Government-owned and Controlled Corporation (GOCC) and Budget of Expenditures and Sources of Financing (BESF)

4.3.1 Must collaborate with stakeholders to gather and document detailed requirements for the reporting dashboard

4.3.2 Design a user-friendly interface for the reporting dashboard

4.3.3 Develop a customizable widgets and visualization of the components

4.3.4 Must secure and implement data integration and connection to relevant databases

4.3.5 Flexible framework for users to customize the layout, content and appearance of the dashboards

4.3.6 Must be able to produce interactive and accurate visual reports showcasing spending patterns, income trends, and goal progress that can provide insights and recommendations based on data analysis

4.3.7 Shall incorporate data analysis and visualization tools to provide accurate and meaning reporting insights

4.3.8 Ensure testing, functionality, security and performance prior to the deployment of the dashboard

4.3.9 THE DBM SHALL PROVIDE THE MENU OF THE FUNCTIONALITIES OF THE DASHBOARDS TO BE DEVELOPED UNDER THE PROJECT.

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4.3 System Interoperability

- Develop a roadmap for enhancing interoperability between legacy systems to newer technologies and define data exchange standards and protocols
- Solution must be ready for an Application Programming Interface (API) to integrate and ensure data synchronization.

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~~4.3~~ **4.4 System Interoperability**

4.4.1 Develop a roadmap for enhancing interoperability between legacy systems to newer technologies and define data exchange standards and protocols

4.4.2 Solution must be ready for an Application Programming Interface (API) to integrate and ensure data synchronization.

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	4.5 TECHNICAL REQUIREMENTS
	4.5.1 MUST BE ABLE TO INTEGRATE AND PULL INFORMATION FROM DBM ORACLE 19C DATABASE.
	4.5.2 MUST BE ABLE TO APPLY BUSINESS RULES TO FORM OR FIELD VALIDATIONS.
	4.5.3 MUST BE ABLE TO GENERATE COMPLEX REPORTS WITH COMPLEX LOGIC AND MULTIPLE DATA SOURCES.
	4.5.4 MUST BE ABLE TO GENERATE REPORTS IN PDF FORMAT
	4.5.5 MUST HAVE A FACILITY TO CONFIGURE THE APPROVAL ROUTING.
	4.5.6 MUST HAVE VERSIONING CAPABILITIES FOR REPORT GENERATION
	4.5.7 MUST HAVE A FACILITY FOR DATA AND DOCUMENT RETENTION POLICY FOR FIVE (5) YEARS BEFORE ARCHIVING.
	4.5.8 MUST BE ABLE TO IMPLEMENT SECURITY STANDARDS TO SECURE DATA.
	4.5.9 MUST HAVE A SECURE CONNECTIVITY (EX. API KEYS, JWT, TOKENIZATION ETC.) TO SYSTEMS WHICH REQUIRES INTEGRATION.
	4.5.10 MUST BE ABLE TO LEVERAGE DATA FABRIC APPROACH IN CENTRALIZING AND UNIFYING DATA FROM MULTIPLE SOURCES.
	4.6 SOLUTION REQUIREMENTS
	THE SERVICE PROVIDER SHOULD BE ABLE TO PROVIDE FIXES ON BUGS ON ALL PERTINENT CONFIGURATIONS, SYSTEMS, AND APPLICATIONS WITHIN THE CONTRACT PERIOD.
4.4 Training, Knowledge Transfer and Turnover of Source Code	**4.4 4.7 Training, Knowledge Transfer and Turnover of Source Code**
• Provide detailed training to end-users and administrators on changes and enhancements.	4.7.1 Provide detailed training to end-users and administrators on changes and enhancements.

• Comprehensive documentation covering system functionalities, API management, and basic to complex troubleshooting. • Submission of Product and User Manuals, Documentation, Training Report/s on the deployment and progress of Budget Management. • Conduct of Trainings among the stakeholders, namely, oversight agencies, NGAs, GOCCs on the Budget Management. • Knowledge transfer and turnover of source codes of the Budget Management to the Department of Budget and Management (DBM) after testing and acceptance.	4.7.2 Comprehensive documentation covering system functionalities, API management, and basic to complex troubleshooting. 4.7.3 Submission of Product and User Manuals, Documentation, Training Report/s on the deployment and progress of Budget Management. 4.7.4 Conduct of Trainings among the stakeholders, namely, oversight agencies, NGAs, GOCCs on the Budget Management. 4.7.5 Knowledge transfer and turnover of source codes of the Budget Management to the Department of Budget and Management (DBM) after testing and acceptance.

4.5 Solution Requirements

• The service provider should be able to provide fixes on bugs on all pertinent configurations, systems, and applications within the contract period.

4. Qualification Requirements

xxx

4.1. Must be in the Information Technology business for at least (10) years based on the Bureau of Internal Revenue (BIR) Certificate of Registration (COR BIR Form 2303);

xxx

4.2. Must have received at least ten (10) technology-related awards and/or recognitions from 2000 to 2003 based on certifications validated and authenticated by the recognized body;

xxx

4.3. Must have at least 100 practicing technical IT professionals based on certified Human Resource documents;

4. 5. Qualification Requirements

xxx

4.1. **5.1** Must be in the Information Technology **(IT) INDUSTRY OR CONSULTING** business for at least **TEN** (10) years based on the Bureau of Internal Revenue (BIR) Certificate of Registration (COR BIR Form 2303) **AND/OR TPF 10. STATEMENT OF ALL GOVERNMENT AND PRIVATE CONTRACTS COMPLETED WHICH ARE SIMILAR IN NATURE**;

xxx

4.2. **5.2** Must have received at least ten (10) **FIVE (5) FIRM PERFORMANCE OR** technology-related awards and/or recognitions from **FY** 2000 to 2003 based on certifications validated and authenticated by the recognized body;

xxx

4.3. **5.3** Must have at least **ONE HUNDRED (**100) practicing technical IT professionals based on certified Human Resource documents;

4.4. The service provider shall mobilize/ deploy the following eight (8) personnel for the project within the Philippines based on the qualifications itemized in Annex A.1	4.4. **5.4** The service provider shall mobilize/ deploy the following eight (8) personnel for the project within the Philippines based on the qualifications itemized in Annex A.1
xxx	xxx

5. Obligations of the Service Provider

5.1. The Service Provider shall conform strictly with the terms and conditions of this Terms of Reference and report directly to the Office of the Functional Group Head of the ICT Group/ Chief Information Officer (OCIO) of DBM.

5.2. Deployment of personnel for the project should either be onsite or offsite. Three (3) personnel are required to report onsite namely Technical Lead, Agile Lead, and Tester from 8:00 AM to 5:00 PM (weekdays) PM. All personnel that are off-site should be available from 8:00AM – 5:00PM (weekdays), unless there is a need to accomplish in the DBM office.

5.3. Equipment, such as laptops and other peripherals should be provided by the Service Provider.

5.4. Timeline and deployment process to on-board resources should not be more than 14 calendar days after NTP.

5.5. Replacement of personnel due to registration or separation from the firm should not be more than thirty (30) calendar days.

5.6. The Service Provider shall submit a Project Management Plan based on approval of the Inception Reports provide a framework for project planning, communications, reporting, procedural and contractual activities. Weekly status reports shall be submitted accordingly.

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5. 6. Obligations of the Service Provider

5.1. **6.1** The Service Provider shall conform strictly with the terms and conditions of this Terms of Reference and report directly to the Office of the Functional Group Head of the ICT Group/ Chief Information Officer (OCIO) of DBM.

5.2. **6.2** Deployment of personnel for the project should either be onsite or offsite. Three (3) personnel are required to report onsite namely**,** Technical Lead, Agile Lead, and Tester from 8:00 AM to 5:00 PM (weekdays) PM. All personnel that are off-site should be available from 8:00 AM – 5:00 PM (weekdays), unless there is a need to accomplish in the DBM office.

5.3. **6.3** Equipment, such as laptops and other peripherals should be provided by the Service Provider.

5.4. **6.4** Timeline and deployment process to on-board resources should not be more than **FOURTEEN** (14) calendar days after **THE RECEIPT OF THE** NTP.

5.5. **6.5** Replacement of personnel due to registration or separation from the firm should not be more than thirty (30) calendar days.

5.6. **6.6** The Service Provider shall submit a Project Management Plan based on approval of the Inception Reports**,** provide a framework for project planning, communications, reporting, procedural and contractual activities. Weekly status reports shall be submitted accordingly.

Left column:

6. **Obligations of the Procuring Entity**

   6.1. The DBM shall provide the necessary resources for the personnel to be deployed which shall include workstations, internet connection, utilities, office access, repository access, admin access, and database access as may be necessary to perform the deliverables for the project.

   6.2. The DBM shall be responsible for regular activities using agile methodology approach such as scrum, daily huddles, and sprint planning to ensure timely and quality accomplishment of deliverables.

   6.3. The DBM shall orient the personnel on the DBM's policies, procedures, and work assignment.

7. **Terms of Payment and Milestone**

   The schedule of payment shall be based on the following milestones:

   xxx

8. **Service Level Agreement**

   DBM shall maintain a Service Level Agreement with the Service Provider with provisions for liquidated damages for their non-compliance.

Component	Description	Liquidated Damages
Services Availability	The SERVICE PROVIDER shall maintain the Services at an availability of 99.95% to be measure 24x7, with an allowable downtime of twenty-one (21) minutes per month	1/10th of 1% of the total remaining amount shall be imposed for every hour of systems/ solutions unavailability in excess of 21 minutes downtime per month.
xxx		
Systems Administration	Shall be able to resolve administration and operation (Systems, Database, Network, and Back-up) issues raised within four	1/10th of 1% of the total remaining shall be imposed for every hour of delay.

Right column:

~~6.~~ 7. **Obligations of the Procuring Entity**

   ~~6.1.~~ **7.1** The DBM shall provide the necessary resources for the personnel to be deployed**,** which shall include workstations, internet connection, utilities, office access, repository access, admin access, and database access as may be necessary to perform the deliverables for the project.

   ~~6.2.~~ **7.2** The DBM shall be responsible for regular activities using agile methodology approach such as scrum, daily huddles, and sprint planning to ensure timely and quality accomplishment of deliverables.

   ~~6.3.~~ **7.3** The DBM shall orient the personnel on the DBM's policies, procedures, and work assignment.

~~7.~~ 8. **Terms of Payment and Milestone**

   The schedule of payment shall be based on the following milestones:

   xxx

~~8.~~ 9. **Service Level Agreement**

   DBM shall maintain a Service Level Agreement with the Service Provider with provisions for liquidated damages for their non-compliance.

Component	Description	Liquidated Damages
~~Services Availability~~	~~The SERVICE PROVIDER shall maintain the Services at an availability of 99.95% to be measure 24x7, with an allowable downtime of twenty-one (21) minutes per month~~	~~1/10th of 1% of the total remaining amount shall be imposed for every hour of systems/ solutions unavailability in excess of 21 minutes downtime per month.~~
xxx		
Systems Administration	Shall be able to resolve administration and operation (Systems, Database, Network, and Back-up) issues raised within four	1/10th of 1% of the total remaining **PRICE** shall be imposed for every hour of delay.

	(4) hours after it was reported at Help Desk Facility	
	xxx	

8.1. If the Consultant fails to deliver any or all of the Services within the period(s) specified in this Contract, the Procuring Entity shall, without prejudice to its other remedies under this Contract and under the Applicable Law, deduct from the contract price, as liquidated damages, a sum equivalent to one-tenth of one percent (1%) of the price of the unperformed portion of the Services for each day of delay based on the approved contract schedule up to a maximum deduction of ten percent (10%) of the contract price. Once the maximum is reached, the Procuring Entity may consider termination of this Contract.

9. Performance Expectations from the Service Provider

9.1. The consultants to be engaged for this project shall undertake the activities/tasks with the highest standards of professional and ethical competence and integrity.

xxx

10. Confidentiality of Data and Ownership of Source Code

10.1. All technical staff assigned by the Service Provider shall be required to sign a Non-Disclosure Agreement (NDA).

10.2. The DBM Enterprise Network System, its components, parts and all products, products samples and specifications, data, ideas, technology, and technical/non-technical materials, all or any which may be derived from any of the foregoing are strictly confidential.

10.3. The Service Provider agrees to hold all foregoing information in strict confidence. The contractor shall not reproduce or disclose any confidential information to third parties without prior written approval of the DBM.

8.1. **9.1** If the Consultant fails to deliver any or all of the Services within the period(s) specified in this Contract, the Procuring Entity shall, without prejudice to its other remedies under this Contract and under the Applicable Law, deduct from the contract price, as liquidated damages, a sum equivalent to one-tenth of one percent (1%) of the price of the unperformed portion of the Services for each day of delay based on the approved contract schedule up to a maximum deduction of ten percent (10%) of the contract price. Once the maximum is reached, the Procuring Entity may consider termination of this Contract.

9. **10. Performance Expectations from the Service Provider**

9.1. **10.1** The consultants to be engaged for this project shall undertake the activities/tasks with the highest standards of professional and ethical competence and integrity.

xxx

10. **11. Confidentiality of Data and Ownership of Source Code**

10.1. **11.1** All technical staff assigned by the Service Provider shall be required to sign a Non-Disclosure Agreement (NDA).

10.2. **11.2** The DBM Enterprise Network System, its components, parts and all products, products samples and specifications, data, ideas, technology, and technical/non-technical materials, all or any **OF** which may be derived from any of the foregoing are strictly confidential.

10.3. **11.3** The Service Provider agrees to hold all foregoing information in strict confidence. The contractor shall not reproduce or disclose any confidential information to third parties without prior written approval of the DBM.

10.4. All modules developed by the Service Provider for the Project should be turned-over to DBM, including all components necessary to run and support the solution (i.e. source code, configuration file).	~~10.4.~~ **11.4** All modules developed by the Service Provider for the Project should be turned-over to DBM, including all components necessary to run and support the solution (i.e. source code, configuration file).
10.5. Upon acceptance by DBM of the fully tested and fully developed Budget Management process including the dashboards for the Government=Owned and/or controlled corporations (GOCC) and the source code and pertinent documentation shall be turned over to the DBM Office of the Chief Information Officer (OCIO).	~~10.5.~~ **11.5** Upon acceptance by DBM of the fully tested and fully developed Budget **AND** Management process including the dashboards for the ~~Government=Owned~~ **GOVERNMENT-OWNED** and/or controlled corporations (GOCC) and the source code and pertinent documentation shall be turned over to the DBM Office of the Chief Information Officer (OCIO).
xxx	xxx

Annex A.1
Qualification and Responsibilities of the Personnel to be Deployed for the Project

Annex A.1
Qualification and Responsibilities of the Personnel to be Deployed for the Project
(Revised)

No.	Particulars	Resource Count	Qualifications
1.	Technical Lead	One (1)	xxx

No.	Particulars	Resource Count	Qualifications	Tasks
1.	Technical Lead	One (1)	xxx	• **REVIEW AND ANALYZE PROJECT REQUIREMENTS AND BUILD TECHNICAL ARCHITECTURE AND SOLUTION DESIGN BASED ON BUSINESS NEEDS.** • **PROVIDE ESTIMATES AND SIZING RECOMMENDATIONS.** • **LEAD THE DEVELOPMENT OF THE SOLUTION AND ENFORCES DEVELOPMENT BEST PRACTICES**

								AND ENSURES QUALITY OF DELIVERY.
								• COMMUNICATES AND UNDERSTAND THE REQUIRED SYSTEMS INTEGRATIONS
								• PROVIDE TECHNICAL RECOMMENDATION, EXPERTISE AND ASSISTANCE TO STAKEHOLDERS LIKE BUSINESS ANALYSTS AND SOFTWARE DEVELOPMENT TEAMS.
								• RECOMMEND SOLUTION APPROACHES/WORKAROUNDS WHEN TECHNICAL ISSUES ARISE.
								• HELP LIAISE AND COORDINATE WITH PROJECT TEAM MEMBERS, IT TEAM, END-USERS, AND MANAGEMENT TO ENSURE PROJECTS ARE COMPLETED TO STANDARDS/BEST PRACTICE.
								• IDENTIFYING RISKS AND FORMING CONTINGENCY PLANS AS SOON AS POSSIBLE
								• HELP PERFORM APPLICATION TROUBLESHOOTING/BUG FIX AS NEEDED.

2.	Agile Technical Lead	One (1)	xxx		2.	Agile Tech-nical Lead	One (1)	xxx	• **MANAGE EXPECTATIONS TO STAKEHOLDERS.** • **MANAGE PROJECT TIMELINE, BUDGET AND RESOURCES.** • **PRIMARY POINT OF CONTACT WITHIN THE CLIENT AND DELIVERY TEAM.** • **ESTABLISH PROJECT PROCESSES, PROCEDURES, DOCUMENTATION WITH THE CLIENT PM.** • **MANAGE ENGAGEMENTS SUCH AS CHANGE REQUESTS, STATUS REPORTS, RISKS, AND RESOURCES.** • **ENSURE THAT THE PROJECT TEAM IS PROVIDED WITH AN ENVIRONMENT CONDUCIVE TO COMPLETING THE PROJECT SUCCESSFULLY.** • **HELP FACILITATE/MANAGE/REMOVE ANY BLOCKER/S ENCOUNTERED BY THE TEAM AND BE ABLE TO HAVE THESE BLOCKERS ESCALATED AS NECESSARY.**
2.	Agile Technical Lead	One (1)	xxx						

								• **COORDINATE CORRECTIVE ACTIONS** • **WORK WITH THE CLIENT PM FOR REPORTING AND LIAISING BETWEEN STEERING COMMITTEE AND PROJECT TEAM.**
3.	API Developer	One (1)	xxx		3.	API Deve-loper	One (1)	xxx	• **DESIGN, DEVELOP, TEST AND DEPLOY APPLICATIONS** • **HELP ANALYZE USER REQUIREMENTS AND PROVIDE RECOMMENDATIONS AS NEEDED** • **DEBUG AND RESOLVE APPLICATION/TECHNICAL ISSUES THAT MAY ARISE RELATING TO API AND INTEGRATIONS.** • **INTEGRATE WITH SYSTEMS REQUIRED AS PART OF THE DEVELOPMENT BY EXPOSING AND CONSUMING APIS USING EXISTING LOW-CODE DEVELOPMENT PLATFORM** • **ASSIST IN VALIDATING REQUIREMENTS TO END-USERS AND PROVIDE INPUTS/RECOMMENDATION IN OVERALL SOLUTIONING.**

No.	Position	Number			No.	Position	Number		Description
									• **ASSIST AND PROVIDE INPUTS IN CRAFTING A DETAILED TECHNICAL DOCUMENTATION/S** • **RECOMMEND AND APPLY CHANGES TO EXISTING CODES AS NECESSARY.** • **DOCUMENT APPLICATION CHANGES AND DEVELOPMENT UPDATES**
4.	Front End Developer	One (1)		xxx	4.	Front End Deve-loper	One (1)	xxx	• **DESIGN, DEVELOP, TEST AND DEPLOY APPLICATIONS** • **HELP ANALYZE USER REQUIREMENTS AND PROVIDE RECOMMENDATIONS AS NEEDED** • **DEBUG AND RESOLVE APPLICATION/TECHNICAL ISSUES THAT MAY ARISE.** • **INTEGRATE WITH SYSTEMS REQUIRED AS PART OF THE DEVELOPMENT.** • **BUILD FRONT-END APPLICATIONS AND IMPLEMENT RESPONSIVE USER INTERFACE COMPONENTS USING OUTSYSTEMS LOW-CODE**

#	Position	No.		#	Position	No.		Duties
								DEVELOPMENT PLATFORM. • **ASSIST IN VALIDATING REQUIREMENTS TO END-USERS AND PROVIDE INPUTS/RECOMMENDATION IN OVERALL SOLUTIONING.** • **ASSIST AND PROVIDE INPUTS IN CRAFTING A DETAILED TECHNICAL DOCUMENTATION/S** • **RECOMMEND AND APPLY CHANGES TO EXISTING CODES AS NECESSARY.** • **DOCUMENT APPLICATION CHANGES AND DEVELOPMENT UPDATES** • **USE AND WORK WITH THE LOW CODE NO CODE FRONTEND DEVELOPMENT PLATFORMS PROCURED BY DBM**
5.	Back End Developer	One (1)	xxx	5.	Back End Developer	One (1)	xxx	• **DESIGN, DEVELOP, TEST AND DEPLOY APPLICATIONS** • **HELP ANALYZE USER REQUIREMENTS AND PROVIDE RECOMMENDATIONS AS NEEDED** • **DEBUG AND RESOLVE**

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									APPLICATION/TECHNICAL ISSUES THAT MAY ARISE.
									• INTEGRATE WITH SYSTEMS REQUIRED AS PART OF THE DEVELOPMENT.
									• BUILD APPLICATION, WORKFLOWS AND DEVELOP ROBOTIC PROCESS AUTOMATIONS (RPA) AS NECESSARY USING THE APPIAN LOW-CODE PLATFORM
									• ASSIST IN VALIDATING REQUIREMENTS TO END-USERS AND PROVIDE INPUTS/RECOMMENDATION IN OVERALL SOLUTIONING.
									• ASSIST AND PROVIDE INPUTS IN CRAFTING A DETAILED TECHNICAL DOCUMENTATION/S
									• RECOMMEND AND APPLY CHANGES TO EXISTING CODES AS NECESSARY.
									• DOCUMENT APPLICATION CHANGES AND DEVELOPMENT UPDATES
									• USE AND WORK WITH THE ROBOTIC PROCESS AUTOMATION

								TOOLS PROCURED BY DBM
6.	QA Tester	One (1)	xxx		6.	QA Tester	One (1)	xxx	• **ANALYZE CLIENT'S STRATEGIES, REQUIREMENTS AND PROCESSES.** • **GATHER DATA, CONDUCT REQUIREMENTS VALIDATION AND REFINEMENT WITH THE CLIENT.** • **DEFINE TESTING STRATEGIES AND HELP IN CRAFTING REQUIREMENTS BACKLOG AND USER STORIES.** • **PROVIDE INPUTS TO THE TECHNICAL LEAD AND DEVELOPERS IN DEFINING APPROPRIATE TECHNICAL SOLUTIONS TO SUPPORT THE BUSINESS.** • **HELP MANAGE THE REQUIREMENTS IN TIGHT COOPERATION WITH THE PROJECT TEAM.** • **PROVIDE APPLICATION DEMO TO STAKEHOLDERS AND COLLECT FEEDBACK.** • **LEAD THE TESTING OF**

							DEVELOPED SOLUTIONS.	
							• **GENERATE REPORTS/DOCUM ENTATIONS FOR TEST PLAN, TEST CASES AND TEST RESULTS**	
7.	Network/ System Administra-tor	One (1)	xxx		7.	Net-work/ System Admi-nistra-tor	One (1)	xxx	• **ENSURE COMPLIANCE WITH INDUSTRY AND REGULATORY STANDARDS RELATED TO NETWORK.** • **COLLABORATE WITH SYSTEM OWNERS, TECHNICAL TEAM, AND FUNCTIONAL TEAM TO DESIGN, IMPLEMENT, TEST, AND VALIDATE A SYSTEM** • **WORK WITH BUSINESS ANALYSTS TO UNDERSTAND DESIRED SYSTEM/NETWOR K REQUIREMENTS**
8.	Security Administra-tor	One (1)	xxx		8.	Securi-ty Admi-nistra-tor	One (1)	xxx	• **ENSURE COMPLIANCE WITH INDUSTRY AND REGULATORY STANDARDS RELATED TO SECURITY.** • **COLLABORATE WITH SYSTEM OWNERS, TECHNICAL TEAM, AND**

| | | | | | | | | FUNCTIONAL TEAM TO DESIGN, IMPLEMENT, TEST, AND VALIDATE A SYSTEM

• WORK WITH BUSINESS ANALYSTS TO UNDERSTAND DESIRED SYSTEM/SECURITY REQUIREMENTS |

TPF 9. OMNIBUS SWORN STATEMENT	**TPF 9. OMNIBUS SWORN STATEMENT (REVISED)**
xxx *[Jurat]* *[Format shall be based on the latest Rules on Notarial Practice]*	xxx *[Jurat]* *[Format shall be based on the latest Rules on Notarial Practice]* **SUBSCRIBED AND SWORN TO BEFORE ME IN [PLACE OF EXECUTION], PHILIPPINES ON THIS [DATE OF NOTARIZATION], AFFIANT EXHIBITING BEFORE ME HIS COMPETENT EVIDENCE OF IDENTITY [VALID IDENTIFICATION ISSUED BY THE GOVERNMENT].** **NOTARY PUBLIC** **DOC. NO.** _____ **;** **PAGE NO.** _____ **;** **BOOK NO.** _____ **;** **SERIES OF** _____ **.**
Bid-Securing Declaration Form xxx *[Jurat]* *[Format shall be based on the latest Rules on Notarial Practice]*	**Bid-Securing Declaration Form (REVISED)** xxx *[Jurat]* *[Format shall be based on the latest Rules on Notarial Practice]*

TPF 10. Statement of all Government and Private Contracts Completed which are Similar in Nature	**TPF 10. Statement of all Government and Private Contracts Completed which are Similar in Nature (REVISED)**
xxx	xxx
Instructions:	Instructions:
a) Projects should be completed within five (5) years immediately preceding December 5, 2023.	a) Projects should be completed within five (5) **TO TEN (10)** years immediately preceding ~~December 5~~ **OCTOBER 27**, 2023.

b) Completed contract:
  (i) Similar contracts shall refer to the design, development, configuration, deployment, and implementation of a solution, system, or platform utilizing or applying the microservices architecture approach. The solutions developed and deployed should be related to financial management or information management systems.
	b) Completed contract:
	  (i) Similar contracts shall refer to the design, development, configuration, deployment, and implementation of a solution, system, or platform utilizing or applying the microservices architecture approach. The solutions developed and deployed should be related to financial management or information management systems **OR CONTRACTS USING, ADOPTING, AND DEPLOYING LOW-CODE FRONTEND AND ROBOTIC AUTOMATION TOOLS.**

xxx	

TPF 11. List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started	TPF 11. List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started **(REVISED)**
xxx	xxx
Instructions:	Instructions:
i. State all ongoing contracts including those awarded but not yet started (government and private contracts which may be similar or not similar to the project being bidded) prior to December 5, 2023.	i. State all ongoing contracts including those awarded but not yet started (government and private contracts which may be similar or not similar to the project being bidded) prior to ~~December 5~~ **OCTOBER 27**, 2023.
	Note: **Attached are the following documents which should be used as part of the Bidding Documents to be submitted by the bidders:** 1. **Section VI. Terms of Reference (Revised)** 2. **Annex A.1 Qualification and Responsibilities of the Personnel to be Deployed for the Project (Revised)** 3. **TPF 9. Omnibus Sworn Statement (Revised)** 4. **Bid-Securing Declaration Form (Revised)** 5. **TPF 10. Statement of all Government and Private Contracts Completed which are Similar in Nature (Revised)** 6. **TPF 11. List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started (Revised)** **Attached for Guidance of the Bidders are the following:** 7. **Checklist of Eligibility Documents (for shortlisting purposes)** 8. **Checklist of the Requirements for the Technical and Financial Proposal**

Other matters:

 ➢ The "No Contact Rule" shall be strictly observed.   Bidders are not allowed to communicate with any member of the Bids and Awards Committee, Technical Working Group or Secretariat effective October 27, 2023 right after the opening of bids.

 ➢ For guidance and information of all concerned.

RAMON VICENTE B. ASUNCION
Director IV
Vice Chairperson, DBM-BAC

Section VI. Terms of Reference (Revised)

1.   Project Title

Managed Services for the Development of Microservices for the Budget and Management of the Department of Budget and Management (DBM).

2.   Objective

This project aims to optimize budget management functions through the development of data-driven dashboards, real-time systems, monitoring tools, and data analytics that will enable oversight agencies, especially DBM, to make informed decisions in the various phases of the budget cycle.

3.   Duration of the Contract

The Contract Period for the project is twelve (12) months upon the issuance of the Notice to Proceed (NTP).

4.   Scope of Work

The Service Provider shall undertake the following:

4.1   Analysis of Existing Budget Management Systems,

4.1.1 Shall conduct a comprehensive Analysis of the existing systems specifically the following:

- **Budget Preparation** – Online Submission of Budget Proposal System (OSBP), Budget Preparation Management System (BPMS) and Government Manpower Information System (GMIS)
- **Budget Legislation** – e-Appropriation
- **Budget Execution** – eBudget
- **Budget Accountability** - Unified Reporting System (URS)

4.1.2   Must identify strengths, weaknesses, and areas for improvement.
4.1.3   Improvement of the systems must be readily available for seamless data exchange between other systems for an Application Programming Interface (API).
4.1.4   Propose system enhancements based on the assessment findings and stakeholder requirements.
4.1.5   Prioritize enhancements that improve data accuracy, reporting capabilities, and user experience.

4.2   Conduct of Design Thinking Workshops
4.2.1   Conduct design thinking workshops to understand the budget management cycle based on the user perspective.
4.2.2   Must document the output of the design thinking workshops and identify the following:

       4.2.2.1 Pain points, gaps and opportunities for improvement.

       4.2.2.2 Propose enhancements based on the assessment findings and stakeholder requirements.

4.2.3   The number of design thinking workshops will depend on the needs as determined by the service provider and the DBM.

4.3 Development of Flexible Reporting Dashboard for National Expenditure Program (NEP), Government-owned and Controlled Corporation (GOCC) and Budget of Expenditures and Sources of Financing (BESF)

4.3.1   Must collaborate with stakeholders to gather and document detailed requirements for the reporting dashboard

4.3.2   Design a user-friendly interface for the reporting dashboard

4.3.3   Develop a customizable widgets and visualization of the components

4.3.4   Must secure and implement data integration and connection to relevant databases

4.3.5   Flexible framework for users to customize the layout, content and appearance of the dashboards

4.3.6   Must be able to produce interactive and accurate visual reports showcasing spending patterns, income trends, and goal progress that can provide insights and recommendations based on data analysis

4.3.7   Shall incorporate data analysis and visualization tools to provide accurate and meaning reporting insights

4.3.8   Ensure testing, functionality, security and performance prior to the deployment of the dashboard

4.3.9   The DBM shall provide the menu of the functionalities of the Dashboards to be developed under the contract.

4.4 System Interoperability

4.4.1 Develop a roadmap for enhancing interoperability between legacy systems to newer technologies and define data exchange standards and protocols

4.4.2 Solution must be ready for an Application Programming Interface (API) to integrate and ensure data synchronization.

4.5 Technical Requirements

4.5.1   Must be able to integrate and pull information from DBM Oracle 19C Database.

4.5.2   Must be able to apply business rules to form or field validations.

4.5.3   Must be able to generate complex reports with complex logic and multiple data sources.

4.5.4   Must be able to generate reports in PDF format

4.5.5   Must have a facility to configure the approval routing.

4.5.6   Must have versioning capabilities for report generation

4.5.7   Must have a facility for data and document retention policy for five (5) years before archiving.

4.5.8   Must be able to implement security standards to secure data.

4.5.9 Must have a secure connectivity (ex. API keys, JWT, tokenization etc.) to systems which requires integration.

4.5.10 Must be able to leverage data fabric approach in centralizing and unifying data from multiple sources.

4.6 Solution Requirements

The service provider should be able to provide fixes on bugs on all pertinent configurations, systems, and applications within the contract period.

4.7 Training, Knowledge Transfer and Turnover of Source Code

4.7.1 Provide detailed training to end-users and administrators on changes and enhancements.

4.7.2 Comprehensive documentation covering system functionalities, API management, and basic to complex troubleshooting.

4.7.3 Submission of Product and User Manuals, Documentation, Training Report/s on the deployment and progress of Budget Management.

4.7.4 Conduct of Trainings among the stakeholders, namely, oversight agencies, NGAs, GOCCs on the Budget Management.

4.7.5 Knowledge transfer and turnover of source codes of the Budget Management to the Department of Budget and Management (DBM) after testing and acceptance.

5. Qualification Requirements

The managed services for the microservices of the Budget and Management for the DBM shall be undertaken by a reputable Information Technology (IT) Firm. The firm, shall have the following qualifications:

5.1 Must be in the Information Technology (IT) Industry or Consulting business for at least ten (10) years based on the Bureau Internal Revenue (BIR) Certificate of Registration (COR BIR Form 2303) and/or TPF 10. *Statement of All Government and Private Contracts Completed which are Similar in Nature*;

Note: The Bureau of Internal Revenue (BIR) Certificate of Registration (COR BIR Form 2303) will be submitted during shortlisting.

5.2 Must have received at least five (5) firm performance or technology-related awards and/or recognitions from FY 2000 to 2023 based on certifications validated and authenticated by the recognized body;

Note: Proof/s of awards and/or recognitions will be submitted during shortlisting.

5.3 Must have at least one hundred (100) practicing technical IT professionals based on certified Human Resource documents;

Note: A certification from the firm's human resource unit shall be submitted during the shortlisting.

5.4 The service provider shall mobilize/ deploy the following eight (8) personnel for the project within the Philippines based on the qualifications itemized in Annex A.1:

No.	Resource	Resource Count
1	Technical Lead	1
2	Agile Technical Lead	1
3	API Developer	1
4	Front End Developer	1
5	Back End Developer	1
6	QA Tester	1
7	Network Administrator	1
8	Security Administrator	1

6. **Obligations of the Service Provider**

6.1 The Service Provider shall conform strictly with the terms and conditions of this Terms of Reference and report directly to the Office of the Functional Group Head of the ICT Group / Chief Information Officer (OCIO) of DBM.

6.2 Deployment of personnel for the project should either be onsite or offsite. Three (3) personnel are required to report onsite namely Technical Lead, Agile Lead, and Tester from 8:00 AM to 5:00 PM (weekdays). All personnel that are off-site should be available from 8:00 AM - 5:00 PM (weekdays), unless there is a need to accomplish in the DBM office.

6.3 Equipment, such as laptops and other peripherals should be provided by the Service Provider.

6.4 Timeline and deployment process to on-board resources should not be more than fourteen (14) calendar days after the receipt of the NTP.

6.5 Replacement of personnel due to resignation or separation from the firm should not be more than thirty (30) calendar days.

6.6 The Service Provider shall submit a Project Management Plan based on approval of the Inception Reports, provide a framework for project planning, communications, reporting, procedural and contractual activities. Weekly status reports shall be submitted accordingly.

7. Obligations of the Procuring Entity

7.1 The DBM shall provide the necessary resources for the personnel to be deployed, which shall include workstations, internet connection, utilities, office access, repository access, admin access, and database access as may be necessary to perform the deliverables for the project.

7.2 The DBM shall be responsible for regular activities using the agile methodology approach such as scrum, daily huddles, and sprint planning to ensure timely and quality accomplishment of deliverables.

7.3 The DBM shall orient the personnel on the DBM's policies, procedures, and work assignment.

8. Terms of Payment and Milestone

The schedule of payment shall be based on the following milestones:

Milestone			
Project Activity/ Detailed Activities	**Deliverables**	**Amount to be paid** **(% of Total Project Cost)**	**Date of Submission of Deliverables**
First Tranche Project Plan Documents and Kick-Off	Inception Report ● Project Charter ● Project Management Plan ● Risk Management and Business Continuity Plan ● Change Management Plan ● Project Gantt Chart and Timelines of Project Structure Infrastructure Hardware and Software Assessment ● System Architecture ● Software and Hardware Assessment Report ● Certification of Completion and Acceptance	20% of Total Project Cost	January to February 2024 Work will commence 30 days after the NTP Payment will be based on submission of Inception Reports and approval thereof by the DBM OCIO.

Second Tranche	Project Development	40% of Total Project Cost	March to August 2024
System Development, Configuration, Testing and Deployment	● System Design and Architecture Plan ● Front-End Development ● Back-End Development ● System Functional Integration and Testing ● Quality Assurance and Testing ● User Acceptance Testing for functional and non-functional requirement ● Overall System Acceptance ● Production Deployment ● Data Migration		From the approval of the Tranche 1 Deliverables Payment will be based on submission of Users Acceptance Test Report for the Project Development Phase and approval thereof by the DBM OCIO
Third Tranche System Go-Live and Stabilization	Full Implementation Plan for Project Completion ● Knowledge Transfer ● System and Functional Documentation Manual ● Delivery and completion of all project deliverables ● Project source code turn-over ● Project technical support in Go-Live implementation	40% of Total Project Cost	September to December 2024 From the approval of the Tranche 2 Deliverables Payment will be based on submission of Certificate of Acceptance for the Project Completion with the following supporting documents: a. Statement of Account (SOA)/ Billing Statement b. NDA and approval thereof by the DBM OCIO

9. Service Level Agreement

DBM shall maintain a Service Level Agreement (SLA) with the Service Provider with provisions for liquidated damages for their non-compliance.

Component	Description	Liquidated Damages
Provision of system backup	Must provide back-up and restore services.	1/10th of 1% of the total contract price shall be imposed for every day of every backup that are not performed.
Technical Support	Resolve every problem and fix bugs on both software and hardware components mentioned above within four (4) hours after it was reported during the project period. It shall refer to a condition wherein the reported problem is resolved by the CONTRACTOR to the satisfaction of the DBM.	1/10th of 1% of the total contract price shall be imposed for every hour of delay.
Systems Administration	Shall be able to resolve administration and operation (Systems, Database, Network, and Back-up) issues raised within four (4) hours after it was reported at Help Desk Facility.	1/10th of 1% of the total remaining price shall be imposed for every hour of delay.
Provision of Reports	Must provide monthly Technical and Service Reports to be submitted every first week of the subsequent month.	1/10th of 1% of the total remaining price shall be imposed for every day of delay.
Compliance with Deliverables	Deliverables based on Section 7 Terms of Payment and Milestones	1/10th of 1% of the total remaining price shall be imposed for every day of delay.

9.1 If the Consultant fails to deliver any or all of the Services within the period(s) specified in this Contract, the Procuring Entity shall, without prejudice to its other remedies under this Contract and under the Applicable Law, deduct from the contract price, as liquidated damages, a sum equivalent to one-tenth of one percent (1%) of the price of the unperformed portion of the Services for each day of delay based on the approved contract schedule up to a maximum deduction of ten percent (10%) of the contract price. Once the maximum is reached, the Procuring Entity may consider termination of this Contract.

10.   Performance Expectations from the Service Provider

10.1 The consultants to be engaged for this project shall undertake the activities/tasks with the highest standards of professional and ethical competence and integrity.

The consultants shall not engage in any activity or action, or make any kind of public pronouncement which may adversely affect the Implementation of the Project.

11. **Confidentiality of Data and Ownership of Source Code**

11.1 All technical staff assigned by the Service Provider shall be required to sign a Non-Disclosure Agreement (NDA).

11.2 The DBM Enterprise Network System, its components, parts and all products, products samples and specifications, data, ideas, technology, and technical/non-technical materials, all or any which may be derived from any of the foregoing are strictly confidential.

11.3 The Service Provider agrees to hold all the foregoing information in strict confidence. The contractor shall not reproduce or disclose any confidential information to third parties without the prior written approval of the DBM.

11.4 All modules developed by the Service Provider for the Project should be turned-over to DBM, including all components necessary to run and support the solution (i.e. source code, configuration file).

11.5 Upon acceptance by DBM of the fully tested and fully developed Budget and Management process including the dashboards for the Government-Owned and/or controlled corporations (GOCC) the source code and pertinent documentation shall be turned over to the DBM Office of the Chief Information Officer (OCIO).

Annex A.1
Qualification and Responsibilities of the Personnel to be Deployed for the Project
(Revised)

No.	Particulars	Resource Count	Qualifications	Tasks
1.	Technical Lead	One (1)	Must have at least five (5) years of experience in any of the following IT industry: • Application and Web-Based Development • Implementing Cloud-Based Applications • Leading database, front-end, and back-end frameworks, and technologies Must have IT related training within the last five (5) years. IT related training would pertain to: IT Infrastructure Trainings, Programming and Database Trainings, Enterprise Business Applications Trainings, Desktop Applications Trainings, or Cyber Security Trainings, Software or Application Trainings, Data management/structure trainings based on the certified true copy of recent training certificates	• Review and Analyze project requirements and build technical architecture and solution design based on business needs. • Provide estimates and sizing recommendations. • Lead the development of the solution and enforces development best practices and ensures quality of delivery. • Communicate and understand required systems integrations • Provide technical recommendation, expertise and assistance to stakeholders like Business Analysts and software development teams. • Recommend Solution Approaches/Workarounds when technical issues arise. • Help Liaise and coordinate with project team members, IT team, end-users, and management to ensure projects are completed to standards/best practice. • Identifying risks and forming contingency plans as soon as possible • Help Perform application troubleshooting/bug fix as needed.

No.	Particulars	Resource Count	Qualifications	Tasks
2.	Agile Technical Lead	One (1)	Must have at least four (4) years of experience in any of the following IT industry: • Senior Developer for Agile Software Development • Manager or a Team Leader • Managing on-premises or cloud-based application projects Certified Agile Scrum Master based on certifications Must have IT related training within the last five (5) years. IT related training would pertain to: IT Infrastructure Trainings, Programming and Database Trainings, Enterprise Business Applications Trainings, Desktop Applications Trainings, or Cyber Security Trainings, Software or Application Trainings, Data management/structure trainings based on the certified true copy of recent training certificates	• Manage expectations to stakeholders. • Manage project timeline, budget and resources. • Primary point of contact within the client and delivery team. • Establish project processes, procedures, documentation with the client PM. • Manage engagements such as change requests, status reports, risks, and resources. • Ensure that the project team is provided with an environment conducive to completing the project successfully. • Help facilitate/manage/remove any blocker/s encountered by the team and be able to have these blockers escalated as necessary. • Coordinate corrective actions • Work with the client PM for reporting and liaising between steering committee and project team.
3.	API Developer	One (1)	Must have at least three (3) years of experience in any of the following IT industry: • Application and web-based development and services • Development and services for integration and APIs • Development using Agile Methodology	• Design, develop, test and deploy applications • Help analyze user requirements and provide recommendations as needed

No.	Particulars	Resource Count	Qualifications	Tasks
			Have worked on at least five (5) projects using API integration and industry-standard solutions At least one (1) training certificate related to latest API Management solutions and framework	• Debug and resolve application/technical issues that may arise relating to API and integrations. • Integrate with systems required as part of the development by exposing and consuming APIs using existing low-code development platform • Assist in validating requirements to end-users and provide inputs/recommendation in overall solutioning. • Assist and provide inputs in crafting a detailed technical documentation/s • Recommend and apply changes to existing codes as necessary. • Document application changes and development updates
4.	Front End Developer	One (1)	Must have three (3) years of experience in IT industry such as the following: • Must have experience in design and implementation of web applications. • Proficient in HTML, CSS, and JavaScript. • Must be experience in ReactJS technology and frameworks Must have worked on at least three (3) projects as a front-end developer Must have at least one (1) training certificate related to latest front-end solutions and framework Must have IT related training within the last five (5) years. IT related training would pertain to: IT Infrastructure Trainings, Programming and Database Trainings, Enterprise Business Applications Trainings, Desktop Applications Trainings, or Cyber Security Trainings, Software or	• Design, develop, test and deploy applications • Help analyze user requirements and provide recommendations as needed • Debug and resolve application/technical issues that may arise. • Integrate with systems required as part of the development. • Build front-end applications and implement responsive user interface components using OutSystems low-code development platform.

No.	Particulars	Resource Count	Qualifications	Tasks
			Application Trainings, Data management/structure trainings based on the certified true copy of recent training certificates	• Assist in validating requirements to end-users and provide inputs/recommendation in overall solutioning. • Assist and provide inputs in crafting a detailed technical documentation/s • Recommend and apply changes to existing codes as necessary. • Document application changes and development updates • Should be able to use and work with the low code no code frontend development platforms procured by DBM

5.	Back End Developer	One (1)	Must have at least three (3) years of experience in any of the following IT industry:
			
			    • Application and web-based development and services
			    • Development and services for back-end application's business logic design execution using leading technologies
			    • Experience in Server-side scripting/programming languages like Java, .NET, PHP, Python, JavaScript, C#, etc.
			
			Must have worked on at least three (3) projects as a back-end developer
			
			Must have at least one (1) training certificate related to latest back-end solutions and framework
			Must have IT related training within the last five (5) years. IT related training would pertain to: IT Infrastructure Trainings, Programming and Database Trainings, Enterprise Business Applications Trainings, Desktop Applications Trainings, or Cyber Security Trainings, Software or Application Trainings, Data management/structure trainings based on the certified true copy of recent training certificates
				• Ability to design, develop, test and deploy applications
				
				• Help analyze user requirements and provide recommendations as needed
				
				• Debug and resolve application/technical issues that may arise.
				
				• Integrate with systems required as part of the development.
				
				• Build application, workflows and develop Robotic Process Automations (RPA) as necessary using the Appian Low-Code Platform
				
				• Assist in validating requirements to end-users and provide inputs/recommendation in overall solutioning.

No.	Particulars	Resource Count	Qualifications	Tasks
				• Assist and provide inputs in crafting a detailed technical documentation/s • Recommend and apply changes to existing codes as necessary. • Document application changes and development updates • Should be able to use and work with the robotic process automation tools procured by DBM

6.	QA Tester	One (1)	Must have at least two (2) years of experience in any of the following IT industry:
			  • Relevant work experience in development and/or testing role
			  • Must have strong knowledge/practical exposure to development/scripting languages and environments (e.g. C#, Java, C++, PHP, etc.)
			  • Must have strong knowledge/practical exposure to both Relational and NoSQL DMBs
			  • Must be knowledgeable of automated testing tools, (e.g. QTP, Rational Robot, etc.)
			
			Must have IT related training within the last five (5) years. IT related training would pertain to: IT Infrastructure Trainings, Programming and Database Trainings, Enterprise Business Applications Trainings, Desktop Applications Trainings, or Cyber Security Trainings, Software or Application Trainings, Data management/structure trainings based on the certified true copy of recent training certificates
				• Analyze client's strategies, requirements and processes.
				
				• Gather data, conduct requirements validation and refinement with the client.
				
				• Define Testing Strategies and help in crafting requirements backlog and user stories.
				
				• Provide inputs to the Technical Lead and developers in defining appropriate technical solutions to support the business.
				
				• Help manage the requirements in tight cooperation with the project team.
				
				• Provide application demo to stakeholders and collect feedback.
				
				• Lead the testing of developed solutions.

No.	Particulars	Resource Count	Qualifications	Tasks
				• Generate Reports/Documentations for Test Plan, Test Cases and Test Results
7.	Network/System Administrator	One (1)	Must have at least three (3) years of experience in any of the following IT industry: • Must have experience in network administration • Must be able to ensure the stable operation of the computer networks • Must have network security principles, including firewalls, intrusion detection systems (IDS), intrusion prevention systems (IPS), VPNs, access controls, and security policies • Experience working with and configuring network devices such as routers, switches, firewalls, load balancers, and access points Must have IT related training within the last five (5) years. IT related training would pertain to: IT Infrastructure Trainings, Programming and Database Trainings, Enterprise Business Applications Trainings, Desktop Applications Trainings, or Cyber Security Trainings, Software or Application Trainings, Data management/structure trainings based on the certified true copy of recent training certificates	• Ensure compliance with industry and regulatory standards related to Network. • Collaborate with system owners, technical team, and functional team to design, implement, test, and validate a system • Work with business analysts to understand desired system/network requirements
8.	Security Administrator	One (1)	Must have at least three (3) years of experience in any of the following IT industry: • Security administration • Experience in conducting security audits, compliance assessments, and vulnerability assessments • Identity and Access Management Principle • Must have common protocols such as SSL, HTTP, DNS, SMTP and IPSec	• Ensure compliance with industry and regulatory standards related to Security. • Collaborate with system owners, technical team, and functional team to design, implement, test, and validate a system • Work with business analysts to understand desired system/security requirements

No.	Particulars	Resource Count	Qualifications	Tasks
			Must have IT related training within the last five (5) years. IT related training would pertain to: IT Infrastructure Trainings, Programming and Database Trainings, Enterprise Business Applications Trainings, Desktop Applications Trainings, or Cyber Security Trainings, Software or Application Trainings, Data management/structure trainings based on the certified true copy of recent training certificates	

REPUBLIC OF THE PHILIPPINES)
CITY/MUNICIPALITY OF _____) S.S.

A F F I D A V I T

I, *[Name of Affiant]*, of legal age, *[Civil Status]*, *[Nationality]*, and residing at *[Address of Affiant]*, after having been duly sworn in accordance with law, do hereby depose and state that:

1. ***Select one, delete the other:***

   If a sole proprietorship: I am the sole proprietor or authorized representative of *[Name of Consultant]* with office address at *[address of Consultant]*;

   If a partnership, corporation, cooperative, or joint venture: I am the duly authorized and designated representative of *[Name of Consultant]* with office address at *[address of Consultant]*;

2. ***Select one, delete the other:***

   If a sole proprietorship: As the owner and sole proprietor or authorized representative of *[Name of Consultant]*, I have full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for *[Name of the Project]* of the *[Name of the Procuring Entity][insert* "as shown in the attached duly notarized Special Power of Attorney" *for authorized representative]*;

   If a partnership, corporation, cooperative, or joint venture: I am granted full power and authority to do, execute and perform any and all acts necessary to participate, submit the bid, and to sign and execute the ensuing contract for *[Name of the Project]* of the *[Name of the Procuring Entity]*, accompanied by the duly notarized Special Power of Attorney, Board/Partnership Resolution, or Secretary's Certificate, whichever is applicable*;*

3. *[Name of Consultant]* is not "blacklisted" or barred from bidding by the Government of the Philippines or any of its agencies, offices, corporations, or Local Government Units, foreign government/foreign or international financing institution whose blacklisting rules have been recognized by the Government Procurement Policy Board;

4. Each of the documents submitted in satisfaction of the bidding requirements is an authentic copy of the original, complete, and all statements and information provided therein are true and correct;

5. *[Name of Consultant]* is authorizing the Head of the Procuring Entity or its duly authorized representative(s) to verify all the documents submitted;

6. *Select one, delete the rest:*

If a sole proprietorship: The owner or sole proprietor is not related to the Head of the Procuring Entity, procurement agent if engaged, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

If a partnership or cooperative: None of the officers and members of *[Name of Bidder]* is related to the Head of the Procuring Entity, procurement agent if engaged, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

If a corporation or joint venture: None of the officers, directors, and controlling stockholders of *[Name of Consultant]* is related to the Head of the Procuring Entity, procurement agent if engaged, members of the Bids and Awards Committee (BAC), the Technical Working Group, and the BAC Secretariat, the head of the Project Management Office or the end-user unit, and the project consultants by consanguinity or affinity up to the third civil degree;

7. *[Name of Consultant]* complies with existing labor laws and standards; and

8. *[Name of Consultant]* is aware of and has undertaken the following responsibilities as a Bidder:

   a) Carefully examine all of the Bidding Documents;

   b) Acknowledge all conditions, local or otherwise, affecting the implementation of the Contract;

   c) Made an estimate of the facilities available and needed for the contract to be bid, if any; and

   d) Inquire or secure Supplemental/Bid Bulletin(s) issued for the *[Name of the Project]*.

9. *[Name of Bidder]* did not give or pay directly or indirectly, any commission, amount, fee, or any form of consideration, pecuniary or otherwise, to any person or official, personnel or representative of the government in relation to any procurement project or activity.

10. In case advance payment was made or given, failure to perform or deliver any of the obligations and undertakings in the contract shall be sufficient grounds to constitute criminal liability for Swindling (Estafa) or the commission of fraud with unfaithfulness or abuse of confidence through misappropriating or converting any payment received by a person or entity under an obligation involving the duty to deliver certain goods or services, to the prejudice of the public and the government of the Philippines pursuant to Article 315 of Act No. 3815 s. 1930, as amended, or the Revised Penal Code.

IN WITNESS WHEREOF, I have hereunto set my hand this_____day of_____, 20 ___at _____ Philippines.

> *[Insert NAME OF BIDDER OR ITS*
> *AUTHORIZED REPRESENTATIVE]*
> *[Insert signatory's legal capacity]*
> Affiant

SUBSCRIBED AND SWORN to before me in [place of execution], Philippines on this [date of notarization], affiant exhibiting before me his competent evidence of identity [valid identification issued by the government].

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Doc. No. _____;
Page No. _____;
Book No. _____;
Series of _____.

TPF 10. Statement of all Government and Private Contracts
Completed which are Similar in Nature
(Revised)

Business Name: _____

Business Address:_____

Name of Client/Contact Person/Contact Number/Email Address	Date of the Contract	Kinds of Consulting Services	Amount of Contract	Date of Delivery	End User's Acceptance or Official Receipt(s) Issued for the Contract
Government					
Private					

Submitted by   : _____
                        (Printed Name and Signature)

Designation   : _____

Date   : _____

Instructions:

a)   Projects should be completed within five (5) to ten (10) years immediately preceding October 27, 2023.

b)   Completed contract:
   (i)   Similar contracts shall refer to the design, development, configuration, deployment, and implementation of a solution, system, or platform utilizing or applying the microservices architecture approach. The solutions developed and deployed should be related to financial management or information management systems or contracts using, adopting and deploying low-code frontend and robotic automation tools.
   (ii)   If there is no similar completed contract in a year, state **none** or equivalent term. This shall not be a basis for disqualification.

c)   Please note that item 6.4 of the Government Procurement Policy Board (GPPB) Circular No. 04-2020 dated September 16, 2020 states that, "[t]he PEs shall check **compliance of the submitted forms with the mandatory provisions stated above**. **Non-submission of the**

Required Forms or non-inclusion of the mandatory provisions in any of the Required Forms shall be a ground for disqualification."

Moreover, GPPB Non-Policy Matter Opinion No. 041-2014 dated October 9, 2014 partially states that "**even contracts that include non-disclosure agreements or confidentiality clauses are required to be disclosed**. It is likewise good to clarify that the requirement refers to a "statement" to be made by the bidder relative to all its ongoing and private contracts, and not the actual submission of the physical contracts."

[shall be submitted with the Bid if bidder opts to provide this form of bid security]
_____

(REPUBLIC OF THE PHILIPPINES)
CITY OF _____) S.S.
x--x

BID SECURING DECLARATION
Project Identification No.: *DBM-2024-03*

To: *[Insert name and address of the Procuring Entity]*

I/We, the undersigned, declare that:

1. I/We understand that, according to your conditions, bids must be supported by a Bid Security, which may be in the form of a Bid-Securing Declaration.

2. I/We accept that: (a) I/we will be automatically disqualified from bidding for any contract with any procuring entity for a period of two (2) years upon receipt of your Blacklisting Order; and, (b) I/we will pay the applicable fine provided under Section 6 of the Guidelines on the Use of Bid Securing Declaration, within fifteen (15) days from receipt of written demand by the procuring entity for the commission of acts resulting to the enforcement of the bid securing declaration under Sections 23.1(b), 34.2, 40.1 and 69.1, except 69.1 (f), of the IRR of RA 9184; without prejudice to other legal action the government may undertake.

3. I/We understand that this Bid-Securing Declaration shall cease to be valid on the following circumstances:

   a. Upon expiration of the bid validity period, or any extension thereof pursuant to your request;

   b. I am/we are declared ineligible or post-disqualified upon receipt of your notice to such effect, and (i) I/we failed to timely file a request for reconsideration or (ii) I/we filed a waiver to avail of said right;

   c. I am/we are declared as the bidder with the Highest Rated Responsive Bid, and I/we have furnished the performance security and signed the Contract.

IN WITNESS WHEREOF, I/We have hereunto set my/our hand/s this＿＿＿day of *[month] [year]* at *[place of execution]*.

<div align="center">

[Insert NAME OF BIDDER OR ITS AUTHORIZED REPRESENTATIVE]
[Insert signatory's legal capacity]
Affiant

</div>

SUBSCRIBED AND SWORN to before me in [place of execution], Philippines on this [date of notarization], affiant exhibiting before me his competent evidence of identity [valid identification issued by the government].

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NOTARY PUBLIC

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Doc. No.　＿＿＿＿;
Page No.　＿＿＿＿;
Book No.　＿＿＿＿;
Series of　＿＿＿＿.

TPF 11. List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started

Business Name: _____

Business Address:_____

Name of Client/ Contact Person/ Contact Number/ Email Address	Date of the Contract	Kinds of Consulting Services	Value of Outstanding Contracts	Date of Delivery
Government				
Private				

Submitted by   : _____
                           (Printed Name and Signature)
Designation   : _____

Date   : _____

Instructions:

   i.   State all ongoing contracts including those awarded but not yet started (government and private contracts which may be similar or not similar to the project being bidded) prior to October 27, 2023.

  ii.   If there is no ongoing contract including awarded but not yet started as of the aforementioned period, state none or equivalent term.

 iii.   Please note that item 6.4 of the Government Procurement Policy Board (GPPB) Circular No. 04-2020 dated September 16, 2020 states that, "[t]he PEs shall check **compliance of the submitted forms with the mandatory provisions stated above. Non-submission of the Required Forms or non-inclusion of the mandatory provisions in any of the Required Forms shall be a ground for disqualification**."

Moreover, GPPB Non-Policy Matter Opinion No. 041-2014 dated October 9, 2014 partially states that "**even contracts that include non-disclosure agreements or confidentiality clauses are required to be disclosed**. It is likewise good to clarify that the requirement refers to a "statement" to be made by the bidder relative to all its ongoing and private contracts, and not the actual submission of the physical contracts."

CHECKLIST OF ELIGIBILITY REQUIREMENTS

ELIGIBILITY AND SHORTLISTING

I.   Class "A" Documents –

Legal Documents

☐ (a) Valid PhilGEPS Registration Certificate (Platinum Membership) (all pages)

Technical Documents

☐ (b) Eligibility Documents Submission Form accompanied by a duly notarized company's Secretary's Certificate or Special Power of Attorney, as applicable (See form); **and**

☐ (c) Curriculum Vitae for the Proposed Professional Staff (Use TPF 6); **and**

☐ (d) Statement of all Government and Private Contracts Completed which are Similar in Nature (TPF 10); **and**

☐ (e) Certificate of Good Standing and Satisfactory Completion or equivalent document (for Completed Contracts); **and**

☐ (f) List of all Ongoing Government and Private Contracts Including Contracts Awarded but not yet Started (Use TPF 11); **and**

☐ (g) Statement of the Consultant's Nationality (Use TPF 12); **and**

☐ (h) Photocopy of the following documents may be submitted together with the Curriculum Vitae to evidence educational attainment, work experience and professional certifications:

　　　1. Certificate of Employment and similar documents (e.g. certificate of engagement)
　　　2. Training programs attended
　　　3. Diploma
　　　4. Professional Certifications and/or Licenses

II.   Class "B" Document –

Legal Documents

☐ (i) Valid Joint Venture Agreement (JVA) if JV is in existence or duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the event that the bid is successful.

* In case a discrepancy exists between the requirements stated in the Checklist and the requirements specified in the Bidding Documents, the latter shall prevail.

CHECKLIST OF REQUIREMENTS FOR THE
TECHNICAL AND FINANCIAL PROPOSAL

Class "A" Documents

Technical Proposal consisting of the following as described in ITB item 10 (C. Preparation of Bids):

☐ 1. **TPF 1. Technical Proposal Submission Form**

☐ 2. **TPF 2. Consultant's References**

☐ 3. **TPF 3. Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services and Facilities to be provided by the Procuring Entity**

☐ 4. **TPF 4. Description of the Methodology and Work Plan for Performing the Project**

☐ 5. **TPF 5. Team Composition and Task Projects**

☐ 6. **TPF 6. Curriculum Vitae for Proposed Professional Staff**
· Including Training Certificate, Diploma, Employment Certificate, and other related Certifications

☐ 7. **TPF 7. Time Schedule for Professional Staff**

☐ 8. **TPF 8. Activity (Work) Schedule**

☐ 9. **TPF 9. Omnibus Sworn Statement**
· Accompanied by the company's Secretary's Certificate or Special Power of Attorney

☐ 10. **Bid Security** as described in ITB clause 15 (see TPF 10 for bid securing declaration form)

Financial Proposal as described in ITB clause 11(C. Preparation of Bids):

☐ 1. **FPF 1. Financial Proposal Submission Form**

☐ 2. **FPF 2. Summary of Costs**

☐ 3. **FPF 3. Breakdown of Price per Activity**

☐ 4. **FPF 4. Breakdown of Remuneration per Activity**

☐ 5. **FPF 5. Reimbursables per Activity**

☐ 6. **FPF 6. Miscellaneous Expenses**

***Should there be any discrepancy between the requirements stated in the Checklist and the requirements specified in the Bidding Documents, the latter shall prevail.**