



LAND BANK OF THE PHILIPPINES

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Central Depository of the Republic of the Philippines

BID BULLETIN NO. 1 For ITB No. 2014-4-002

PROJECT : Customer Relationship Management System Consultancy Services

IMPLEMENTOR : Procurement Department

DATE : September 18, 2014

This Bid Bulletin is hereby issued for the information of the participating bidders on the revision of requirements for the above project, to wit:

- Terms of Reference has been revised particularly on the number of man days in assisting LANDBANK for the evaluation of the technical proposal, to wit:

REFERENCE	FROM	TO
Description / Coverage of Activity 9 – Conduct Bid Technical Evaluation – 3.0 Scope of Project, page 4 of 14	Assist LBP in evaluating the technical proposals of the bidders (not to exceed 5 man days)	Assist LBP in evaluating the technical proposals of the bidders (at least ten (10) man days)
Item no. 3 of 7.0 Qualification Requirements, page 7 of 14	The Consultant shall assist the LANDBANK TWG in evaluating the technical proposals of the bidders (not exceeding five (5) man days)	The Consultant shall assist the LANDBANK TWG in evaluating the technical proposals of the bidders (at least ten (10) man days)

- Please see Revised TOR per attached Annexes A1 to A19.
- Checklist of Bidding Documents has been revised. Please see revised page 147 to 149.
- The deadline of submission and the schedule of opening of eligibility/technical and financial documents/proposals for the above project is re-scheduled from September 25, 2014 to **October 9, 2014, 10:00 A.M.** at the Procurement Department, 25th Floor, LANDBANK Plaza Building, 1598 M. H. Del Pilar corner Dr. Quintos Streets, Malate, Manila.


ALWIN I. REYES
 Department Manager
 Procurement Department




Land Bank of the Philippines

**Customer Relationship Management System (CRMS)
Consultancy Services**

TERMS OF REFERENCE

Version Number : 5.0
Final as of : 11 September 2014
Printed on : 11 September 2014
Author : Technical Working Group (TWG)
Contact Number : 522-0000 local 2289
E-mail Address : ABERNABE@mail.landbank.com

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Document Information


Location

This document is maintained online in the author's workstation at location: C:\Documents and Settings \ E049.CORP \ My Documents \ My Documents \ Datawarehouse \ CRM \ Terms of Reference \ Annex_E_TOR5.00.docx

Revision History

Version Number	Date	Summary of Changes	Revision Marks
0.1	15 May 2014	Draft Terms of Reference (TOR)	N
1.0	18 June 2014	Included the following: <ul style="list-style-type: none"> • Specific key focus areas of strategies in the Name and Description; • Description/coverage in the Scope of Project; and • Minimum qualifications in the Qualification Requirements. 	Y
0.2	04 July 2014	Updated the minimum qualifications in the Qualification Requirements.	Y
0.3	16 July 2014	Change the format of the TOR	
2.0	06 August 2014	Excluded in the Qualifications Requirements the qualifications of the Consulting Firm.	Y
3.0	08 August 2014	Change the format of the TOR	Y
4.0	15 August 2014	Included the following: <ul style="list-style-type: none"> • Description/coverage in phase II.a; • Additional activities (Conduct Bid Technical Evaluation); and • Additional activity (evaluating technical specifications of the bid documents). Revised the following: <ul style="list-style-type: none"> • Bid specifications to Terms of Reference; • Approved budget from Php 8.9M to 10.0M; • Percentage of Acceptance of Project Management Documents from 15% to 10% in the Payment Milestones; • Percentage of acceptance of final consolidated project reports from 15% to 10% in the Payment Milestones; and • Technical Criteria of the Firm Credentials. 	Y

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Version Number	Date	Summary of Changes	Revision Marks
5.0	11 September 2014	Change the description/coverage of Conduct Bid Technical Evaluation and item no. 3 of Qualification Requirements.	Y

Approvals

This document has been approved by:


Name	Position/Title	Approval Date	Signature
EVP Julio D. Climaco	Chair – Head Office Bids and Awards Committee (HOBAC)		

Distribution

This document has been distributed to:

Name	Position/Title
EVP Julio D. Climaco	Chair – Head Office Bids and Awards Committee (HOBAC)
HOBAC Members	
Project Control Book (PCB)	

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1.0 Name and Description of the Project

2.0 Objectives of the Project

3.0 Scope of the Project

4.0 Delivery Time / Completion Schedule

5.0 Approved Budget for Contract (ABC)

6.0 Payment Milestones

7.0 Qualification Requirements


8.0 Documentary Requirements

9.0 Other Terms and Conditions

- 9.1 Proposal Preparation
- 9.2 Proposal Submission
- 9.3 Compliance with Laws, Policies, Processes, Regulations and Standards
- 9.4 Contract Contents

Appendix A Project Team Information

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1.0 Name and Description of the Project

Customer Relationship Management System (CRMS) – Consultancy Services

Customer Relationship Management (CRM) is a business strategy for managing a company's interactions with current and future customers with the aid of technology to organize, automate and synchronize sales, marketing and customer service.

This innovation is one of the key focus areas of strategies and action plans in the Strategic Planning CY 2013 that will provide proper identification of clients' requirements and the corresponding available solutions to address specific needs, such as:

- Anticipate the needs and provide access to appropriate products and services in a timely manner;
- Be proactive in understanding individual customer needs; and
- Enhance and accelerate new product and channel development.

On 18 September 2013, IT Committee (ITCOM) designated Strategic Planning Group to spearhead the creation of the Business Case in tapping a consultant to formulate strategies prior to the acquisition of the system.

On 11 December 2013, the Project Core Team was created to study and determine the business requirements of the project per Special Order No. 2145 Series of 2013.


On 29 April 2014, ITCOM approved the Business Case along with the hiring of consultants (ITCOM Resolution No. 2014-0403), who will conduct the readiness assessment, recommend change plan and prepare documents such as CRM master plan, implementation plan, pro-forma investment plan, bid specifications and other consultancy deliverables.

2.0 Objectives of the Project

The engagement of a Consultant aims to:

1. Recommend best practices and standards on the different segments of CRM (Operational, Analytics and Collaborative);
2. Establish and document current and future requirements of the Bank's CRM systems;
3. Prepare gap analysis of LBP current situation of LBP CRM policies, processes and methodologies versus recommended CRM Roadmap;

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4. Develop and recommend master plan, road map, investment plan, business requirements definition, bid specifications and other consultancy deliverables; and
5. Identify and assess data requirements for the different segments of CRM.

3.0 Scope of Project (Consultancy Services)

The Consulting Firm shall perform and deliver but not limited to the following:


PHASE	ACTIVITIES	DELIVERABLES	DESCRIPTION / COVERAGE
I	1. Conduct Project Planning	Project Management Plan Documents <ul style="list-style-type: none"> • Project Plan; • Risk Report; and • Status Report 	<ul style="list-style-type: none"> • Detailed project approach and methodology; • Scope of services; • Project Timelines; • Involvement of LBP Units; • Project Team composition; • Functions of Consulting Firm and LBP Project Teams; and • Required logistic requirements.
II.a	2. Conduct Readiness Assessment	Readiness Assessment Report	<ul style="list-style-type: none"> • Data collection business processes; • IT architecture and IT plan; • IT staff availability and skills; • IT support processes; • Source system status and preparation processes; • Internal and external CRM reporting requirements; • Best practices and standards; • Comparison of CRM of the Top 5 universal banks in the Philippines; • Comparison of Top 3 CRM Solutions for banking; • Develop and recommend

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PHASE	ACTIVITIES	DELIVERABLES	DESCRIPTION / COVERAGE
			<p>CRM policies, processes and methodologies; and</p> <ul style="list-style-type: none"> • Gap analysis on the current situation of LBP CRM policies, processes and methodologies versus recommended CRM Roadmap.
II.b	3. Recommend Change Plan	Change Plan Document	<ul style="list-style-type: none"> • Organizational structures and processes required to support the implementation of CRM; • Technologies and related policies to support the CRM; and • Required skills to support the CRM.
II.c	4. Create CRM Master Plan	CRM Master Plan	<ul style="list-style-type: none"> • High-level, multi-year, multi-project Roadmap for CRM; • Recommended sequence of projects; • Indicative five year budget to serve as basis for future procurement of hardware, software and consultancy services; and • Technology transfer activities / trainings to facilitate the achievement of in-house technical capability in the development, installation, maintenance and management of the CRM systems.
II.d	5. Prepare Implementation Plan	Implementation Plan	<ul style="list-style-type: none"> • Recommended implementation approach of the CRM; • Scope definition; and

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PHASE	ACTIVITIES	DELIVERABLES	DESCRIPTION / COVERAGE
			<ul style="list-style-type: none"> High level implementation schedule (to be used as basis for evaluating vendors)
II.e	6. Prepare Pro-forma Investment Plan	Pro-forma Investment Plan	Indicative costing for the first module of CRM.
III.a	7. Conduct Requirements Gathering	Business Requirements Definition	Detailed business requirements for the first module of CRM.
III.b	8. Prepare Terms of Reference (TOR)	TOR	<ul style="list-style-type: none"> Detailed TOR first module of CRM; and Proposals shall generic.
IV	9. Conduct Bid Technical Evaluation	Bid Technical Evaluation Results	Assist LBP in evaluating the technical proposals of the bidders (at least ten (10) man days)
For all phases	10. Prepare Project Reports	<ul style="list-style-type: none"> Monthly accomplishment report Consolidated Project Reports to CRM Project Steering Committee for its review, approval and sign-off 	Detailed activities and accomplishments of the project in accordance with the project objectives and scope of consultancy.


4.0 Delivery Time / Completion Schedule

Seven (7) months from the signing of contract.

5.0 Approved Budget for the Contract (ABC)

The Approved Budget for the Contract (ABC) is **PHP 10 M** inclusive of Value-Added Tax, all applicable taxes and out-of-pocket expenses.

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6.0 Payment Milestones

PAYMENT MILESTONE		AMOUNT
10%	Contract Signing (mobilization)	X,XXX,XXX.XX
10%	Acceptance of Project Management Documents (Project Plan, Risk Report, and Risk Report)	X,XXX,XXX.XX
20%	Acceptance of the following deliverables: <ul style="list-style-type: none"> • Readiness Assessment Report • Change Plan Document • CRM Master Plan 	X,XXX,XXX.XX
20%	Acceptance of the following deliverables: <ul style="list-style-type: none"> • Implementation Plan • Pro-forma Investment Plan 	X,XXX,XXX.XX
20%	Acceptance of the following deliverables: <ul style="list-style-type: none"> • Business Requirements Definition • Terms of Reference (TOR) 	X,XXX,XXX.XX
10%	Acceptance of final consolidated project reports (i.e. recommendations, assumptions and constraints)	X,XXX,XXX.XX
10%	Completion of Bid Evaluation	X,XXX,XXX.XX
100%	Total (VAT Inclusive)	XX,XXX,XXX.XX


Note: *It is understood that all charges to remittance of payment shall be for the account of the vendor.*

7.0 Qualification Requirements

- The Consulting Firm shall create a Project Team composed of at least six (6), with one (1) Team Leader, one (1) CRM Solutions Expert, one (1) Analytics Expert, one (1) Technology Expert and two (2) members. Project team members shall be proficient in business analysis, IT solutions and expert in preparing required project documentation.


PROJECT TEAM COMPOSITION	MINIMUM QUALIFICATIONS
1. Team Leader	<ul style="list-style-type: none"> • Proficiency (5 years actual experience and not less than 10 trainings related to CRM) in providing consultancy services for CRM processes and sub-processes; • Direct involvement or participation in advisory services for a CRM project in a local financial institution and / or reputable international bank; • Actual experience in advisory projects for the financial institution involving customers' relationship; and • Project Management experience (5 years actual experience)

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PROJECT TEAM COMPOSITION	MINIMUM QUALIFICATIONS
2. CRM Solutions Expert	<ul style="list-style-type: none"> • Proficiency (5 years actual experience and not less than 8 trainings in CRM Solutions) in providing consultancy services for CRM processes and sub-processes; • Direct involvement or participation in advisory services for CRM in a financial institution and / or reputable international bank; and • Actual experience in advisory projects for the financial institution involving customers' relationship.
3. CRM Analytics Expert	<ul style="list-style-type: none"> • Proficiency (5 years actual experience and not less than 8 trainings in CRM Analytics) in providing consultancy services for CRM processes and sub-processes; • Direct involvement or participation in advisory services for CRM in a financial institution and / or reputable international bank; and • Actual experience in advisory projects for the financial institution involving customers' relationship.
4. Technology Expert	<ul style="list-style-type: none"> • Proficiency (5 years actual experience and not less than 8 trainings related to CRM Technology) in providing consultancy services for CRM processes and sub-processes; • Direct involvement or participation in advisory services for CRM in a financial institution and / or reputable international bank; • Actual experience in advisory projects for the financial institution involving customers relationship; and • With strong IT management skills.
5. Members	<ul style="list-style-type: none"> • With adequate knowledge (3 years actual experience and not less than 3 trainings) in CRM processes and sub-processes; • With exposure in CRM in a financial institution and / or reputable internal bank; • With 5 years actual experience in business analysis and IT solutions implementation; • With experience as technical writer; • Must be analytical, independent and highly research-focused; and • With exceptional attention to detail, ability to set priorities and manage multiple projects simultaneously.

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2. In cases where replacement of any member of the team is unavoidable, the new member must possess the minimum qualifications provided in this TOR. The replacement of the Team Leader and members of the team must be communicated by the Consulting Firm and Team Leader, respectively, to the LBP CRMS Project Steering Committee at least 30 days prior to the execution of change, for evaluation and approval.
3. The Consultant shall assist the LANDBANK TWG in evaluating the technical proposals of the bidders (at least ten (10) man days).
4. The Consulting Firm shall not be allowed to join the procurement process for the acquisition of succeeding CRM Solutions.

8.0 Documentary Requirements

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

1. Executive Summary
2. Salient Features of Proposed Methodology
3. Detailed, Point-by-Point Response to Project Objectives and Deliverables
4. Scope of Services
 - 4.1. Detailed description of all major tasks
 - 4.2. Deliverable items, if any, for each of the major tasks, and
 - 4.3. Competition criteria for each of the major tasks
5. Deliverable Items Summary
 - 5.1. Description, quantity, delivery media and other details of the deliverables
6. LBP responsibilities
 - 6.1. Specific responsibilities relating to resources, skills, infrastructure, documentations, processes, etc., that LBP must satisfy
7. Assumptions
 - 7.1. Constraints and dependencies
8. Schedules
 - 8.1. Major milestones
 - 8.2. Delivery schedule
 - 8.3. Project schedule (major tasks, durations, start and end dates, Gantt chart)
9. Exchange of confidential information, and other agreements
10. Organizational chart for the project
11. List of projects and project Team information using the Project Team Information Form (**Appendix A**)
12. Brief Company Profile
13. Analyst research reports, articles, brochures, white papers and other relevant materials

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9.0 Other Terms and Conditions

9.1 Proposal Preparation

To be eligible for consideration, the Consulting Firm must meet the intent of all mandatory requirements. Compliance with the intent of the requirements shall be determined by the LBP HOBAC in accordance with Section 8.0 of this TOR and on the following:

a. Point-by-point Response

- The Consulting Firm must submit a point-by-point response to all numbered sections, subsections, appendices, annexes and attachments of the Term of Reference (TOR). If no exception, explanation, or clarification is required from its response to a specific item, Consulting Firm shall indicate so in the point-by-point response with the following:

“(Name of Bidder) understands and will comply.”

- It must organize its proposal into sections following the format of this TOR, with tabs separating each section;
- In case its proposal does not comply with the specified proposal format, or is difficult to understand, read or lacks any of the requested information, the proposal will be returned for immediate revision; and
- Responses similar to “Refer to our literature...” or “Please see www... com” are not acceptable. All materials related to a response must be submitted together with the proposal and not just referenced. Any references in an answer to another location in the TOR materials must indicate the specific page numbers and sections stated in the reference.

b. Price Sheet


For the financial portion of the proposal, it must utilize the format found in *Section 6.0 Payment Milestones*, which will serve as the basis for evaluating its price quotation. It should include additional information as necessary to explain in detail its price quotation

9.2 Proposal Submission

a. Consulting Firm must submit:

Three (3) sets (one original and two photocopies) of their technical and financial proposals. The authorized representative(s) of a particular bidder is/are required to sign/initial all the documents for authentication.

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b. Facsimile or electronic submissions are not acceptable

9.3 Compliance with Laws, Policies, Processes, Regulations and Standards

It must, in performance of work under this contract, fully comply with all applicable national or local laws and executive orders.

10.4 Contract Contents

This TOR and any addenda, Consulting Firm's responses including any amendments, any best and final offers, and any negotiations shall be included in any resulting contract. Section 8.0 enumerates all the required information and documents that it must submit as part of its proposal to qualify for further consideration, and will serve as basis for any contract between LBP and Consulting Firm.

10.0 Short Listing

The maximum number of Bidders for shortlisting is limited to the top three (3) obtaining the highest overall scores; provided however, that they obtained the minimum score of **Eighty (80)** under Section 12.0 The Technical Criteria of this TOR.

11.0 Bid Evaluation


A. Bid Evaluation Procedure

Quality-Cost Based Evaluation (QCBE) Selection per Republic Act 9184, also known as "Government Procurement Reform Act".

B. Overall Bid Evaluation Criteria and Rating System

CRITERIA	WEIGHT (a)	RAW SCORE (b)	SCORE (ab)	REMARKS
1. Technical Criteria <i>(Firm Credentials, Personnel Qualifications and Number of Consultants)</i>	85%			

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CRITERIA	WEIGHT (a)	RAW SCORE (b)	SCORE (ab)	REMARKS						
<p>2. Financial Criteria</p> <p>The proposed bid price of participating bidder:</p> <table border="1" data-bbox="384 627 818 734"> <tr> <td>Condition</td> <td>Raw</td> </tr> <tr> <td>Lowest Bid</td> <td>100%</td> </tr> <tr> <td>Other Bids</td> <td>BS</td> </tr> </table> <p style="text-align: center;">$BS = 100 * BL/B$</p> <p>where:</p> <p>BS - Score of bid under consideration BL - Price of lowest bid B - Price of bid under consideration</p>	Condition	Raw	Lowest Bid	100%	Other Bids	BS	15%			
Condition	Raw									
Lowest Bid	100%									
Other Bids	BS									
GRAND TOTAL	100%									


12.0 Technical Criteria

CRITERIA	WEIGHT (a)	SCORE (ab)	REMARKS
1. Firm Credentials	25%		
<p>a. Successfully completed engagements on CRM Consultancy projects (based on client certification of successfully completed project).</p>	15%		


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CRITERIA	WEIGHT (a)	SCORE (ab)	REMARKS								
<p style="text-align: center;"><u>Philippine Universal Banks</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">More than 5 engagements with Philippine universal / commercial banks</td> <td style="text-align: center; padding: 5px;">10%</td> </tr> <tr> <td style="padding: 5px;">More than 1 but less than 6 engagements in the Philippine universal / commercial banks</td> <td style="text-align: center; padding: 5px;">5%</td> </tr> <tr> <td style="padding: 5px;">At least 1 engagement in the Philippine universal / commercial bank</td> <td style="text-align: center; padding: 5px;">3%</td> </tr> <tr> <td style="padding: 5px;">None</td> <td style="text-align: center; padding: 5px;">0</td> </tr> </table>	More than 5 engagements with Philippine universal / commercial banks	10%	More than 1 but less than 6 engagements in the Philippine universal / commercial banks	5%	At least 1 engagement in the Philippine universal / commercial bank	3%	None	0	10%		
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None	0										
<p style="text-align: center;"><u>Reputable International Banks</u></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">More than 5 engagements with reputable international banks</td> <td style="text-align: center; padding: 5px;">5%</td> </tr> <tr> <td style="padding: 5px;">More than 1 but less than 6 engagements with reputable international banks</td> <td style="text-align: center; padding: 5px;">3%</td> </tr> <tr> <td style="padding: 5px;">At least 1 engagement with reputable international bank</td> <td style="text-align: center; padding: 5px;">2%</td> </tr> <tr> <td style="padding: 5px;">None</td> <td style="text-align: center; padding: 5px;">0</td> </tr> </table>	More than 5 engagements with reputable international banks	5%	More than 1 but less than 6 engagements with reputable international banks	3%	At least 1 engagement with reputable international bank	2%	None	0	5%		
More than 5 engagements with reputable international banks	5%										
More than 1 but less than 6 engagements with reputable international banks	3%										
At least 1 engagement with reputable international bank	2%										
None	0										


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CRITERIA	WEIGHT (a)	SCORE (ab)	REMARKS		
b. On-going / currently implementing CRM Consultancy projects (based on client certification of on-going project)	10%				
<u>Philippine Universal Banks</u>	7%				
<table border="1" style="width: 100%;"> <tr> <td style="width: 80%;">More than 5 engagements with Philippine universal / commercial banks</td> <td style="width: 20%; text-align: center;">7%</td> </tr> </table>	More than 5 engagements with Philippine universal / commercial banks	7%			
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<table border="1" style="width: 100%;"> <tr> <td style="width: 80%;">None</td> <td style="width: 20%; text-align: center;">0</td> </tr> </table>	None	0			
None	0				
<u>Reputable International Banks</u>	3%				
<table border="1" style="width: 100%;"> <tr> <td style="width: 80%;">More than 5 engagements with reputable international banks</td> <td style="width: 20%; text-align: center;">3%</td> </tr> </table>	More than 5 engagements with reputable international banks	3%			
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<table border="1" style="width: 100%;"> <tr> <td style="width: 80%;">At least 1 engagement with reputable international bank</td> <td style="width: 20%; text-align: center;">1%</td> </tr> </table>	At least 1 engagement with reputable international bank	1%			
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<table border="1" style="width: 100%;"> <tr> <td style="width: 80%;">None</td> <td style="width: 20%; text-align: center;">0</td> </tr> </table>	None	0			
None	0				

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CRITERIA	WEIGHT (a)	SCORE (ab)	REMARKS				
2. Personnel Qualifications and Number of Consultant Project Team Members	75%						
a. Team Leader to be assigned is highly qualified to implement the engagement <table border="1" data-bbox="435 696 805 907"> <tr> <td style="text-align: center;">Exceeds minimum competencies</td> <td style="text-align: center;">15%</td> </tr> <tr> <td style="text-align: center;">Meets minimum qualifications</td> <td style="text-align: center;">10%</td> </tr> </table>	Exceeds minimum competencies	15%	Meets minimum qualifications	10%	15%		
Exceeds minimum competencies	15%						
Meets minimum qualifications	10%						
b. CRM Solutions Expert to be assigned is highly qualified to implement the engagement even in the absence of the Team Leader <table border="1" data-bbox="435 1135 805 1323"> <tr> <td style="text-align: center;">Exceeds minimum competencies</td> <td style="text-align: center;">15%</td> </tr> <tr> <td style="text-align: center;">Meets minimum qualifications</td> <td style="text-align: center;">10%</td> </tr> </table>	Exceeds minimum competencies	15%	Meets minimum qualifications	10%	15%		
Exceeds minimum competencies	15%						
Meets minimum qualifications	10%						
c. CRM Analytics Expert to be assigned is highly qualified to implement the engagement even in the absence of the Team Leader <table border="1" data-bbox="435 1565 805 1753"> <tr> <td style="text-align: center;">Exceeds minimum competencies</td> <td style="text-align: center;">15%</td> </tr> <tr> <td style="text-align: center;">Meets minimum qualifications</td> <td style="text-align: center;">10%</td> </tr> </table>	Exceeds minimum competencies	15%	Meets minimum qualifications	10%	15%		
Exceeds minimum competencies	15%						
Meets minimum qualifications	10%						

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CRITERIA	WEIGHT (a)	SCORE (ab)	REMARKS				
<p>d. Technology Expert to be assigned is highly qualified to implement the engagement even in the absence of the Team Leader</p> <table border="1" data-bbox="435 666 805 875"> <tr> <td>Exceeds minimum competencies</td> <td>15%</td> </tr> <tr> <td>Meets minimum qualifications</td> <td>10%</td> </tr> </table>	Exceeds minimum competencies	15%	Meets minimum qualifications	10%	15%		
Exceeds minimum competencies	15%						
Meets minimum qualifications	10%						
<p>e. Members to be assigned are highly qualified to perform the required tasks</p> <table border="1" data-bbox="435 1034 805 1242"> <tr> <td>Exceeds minimum competencies</td> <td>10%</td> </tr> <tr> <td>Meets minimum qualifications</td> <td>5%</td> </tr> </table>	Exceeds minimum competencies	10%	Meets minimum qualifications	5%	10%		
Exceeds minimum competencies	10%						
Meets minimum qualifications	5%						
<p>f. No. of Team members to be assigned to perform the required tasks</p> <table border="1" data-bbox="435 1408 805 1594"> <tr> <td>More than 6</td> <td>5%</td> </tr> <tr> <td>At least 6</td> <td>3%</td> </tr> </table>	More than 6	5%	At least 6	3%	5%		
More than 6	5%						
At least 6	3%						
GRAND TOTAL	100%						

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	Land Bank of the Philippines Customer Relationship Management System (CRMS) Consultancy Services TERMS OF REFERENCE	Appendix A
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Project Team Information
(PROJECT ROLE)

(Surname, First name, Middle Name)

I. Responsibilities: *(Enumerate the details)*

II. Educational Attainment

NAME OF INSTITUTION /SCHOOL	PERIOD OF ATTENDANCE	DIPLOMA/DEGREE /EQUIVALENT	AWARDS /DISTINCTIONS RECEIVED

III. Work/Project Experience

JOB TITLE	WORK DESCRIPTION	COMPANY	PERIOD COVERED

IV. Proficiency *(Provide certificate and other documents to support your answers)*

1. Number of years of being a constituent partner of the consultancy firm	
2. Number of years of actual experience in providing consultancy services for CRMS processes and sub-processes	
3. Number of trainings attended in CRMS processes and sub-processes	
4. Number of years of direct involvement or participation in advisory services for CRMS in a Philippine universal bank and/or reputable international bank	
5. Number of years of actual experience in advisory projects for the banking institution involving CRMS	

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**Customer Relationship Management System (CRMS)
The Technical Working Group (TWG)**

CERTIFICATE OF ACCEPTANCE

This is to certify that the attached Terms of Reference (TOR) Version 5.0, Final as of 11 September 2014, for the Customer Relationship System (CRMS) – Consultancy Services have been reviewed and accepted by the Technical Working Group.

TWG TEAM	POSITION	UNIT	SIGNATURE
1. Bedrijo, Vivian C.	AVP	CeBG	
2. Bernabe, Ariel L.	SMA	CMISD	
3. Cabael, Jennifer C.	TSO	ISDD	
4. Carpio, Rolando R.	DM	GSIS Branch	
5. Casaclang, Loida V.	ADM	ProcD	
6. Chuidian-Santos, Ma. Theresa B.	BEO	CMISD	
7. De Leon, Arnel F.	ITO	SID	
8. Ferolino, Ana Maria Concepcion G.	PDO	CSPDD	
9. Francisco, Alvin B	JMA	TAMD	
10. Go, Helen M.	ADM	Symbols Unit	
11. Gonzales, Delfin I.	BEO	EPD	
12. Ilagan, Edward S.	ISO	CMISD	
13. Ladores, Sofia C.	AVP	BRMD	
14. Navora, Eric L.	SMA	DCCCD	
15. Ofindo, Carolyn I.	DM	LSD	
16. Panotes, Ma. Enriqueta P.	BEO	CMISD	
17. Pornuevo, Lani U.	PM	IT-PMO	
18. Sorita, Gil M.	SMA	BBSD	
19. Tarrobago, Anna Giselle R.	SMA	CMISD	
20. Villanueva, Catherine Rowena B.	VP	CAD	

Checklist of Bidding Documents for Procurement of Goods and Services

The FIRST ENVELOPE shall contain the following Eligibility/Technical information/documents:

Eligibility/Technical requirements

Class "A" Documents

A. Legal Documents

1. Registration certificate from SEC, Department of Trade and Industry (DTI) or sole proprietorship, or CDA for cooperatives, or any proof of such registration as stated in the Bidding Documents.
2. Valid and current mayor's permit issued by the city or municipality where the principal place of business of the prospective bidder is located.
3. Tax Clearance per Executive Order 398, Series of 2005, as finally reviewed and approved by the BIR.

B. Technical Documents

4. Statement of the prospective bidder of all its ongoing government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period as provided in the Bidding Documents. The statement shall include all information required in the PBDs prescribed by the GPPB. (sample form – Form No. 3).
5. Statement of the prospective bidder of all its completed government and private contracts, which are similar in nature and complexity to the contract to be bid, within the relevant period as provided in the Bidding Documents. The statement shall include all information required in the PBDs prescribed by the GPPB. (sample form – Form No.4)
6. Statement of the consultant specifying its nationality and confirming that those who will actually perform the service are registered professionals authorized by the appropriate regulatory body to practice those professions and allied professions in accordance with Clause 1.2.
7. The prospective bidder's audited financial statements, showing, among others, the prospective bidder's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission.

8. The prospective bidder's computation for its Net Financial Contracting Capacity (sample form - Form No. 5)
9. Certification issued by the bidder stating the following:
 - Number of years of being a constituent partner of the consultancy firm.
 - Number of years of actual experience in providing consultancy services for CRMS processes and sub-processes.
 - Number of trainings attended in CRMS processes and sub-processes.
 - Number of years of direct involvement or participation in advisory services for CRMS in a Philippine universal bank and/or reputable international bank.
 - Number of years of actual experience in advisory projects for the banking institution involving CRMS.
10. TPF 2 – Experience of the Firm/Consultant's References.
11. TPF 5 – Team Composition/Project Engagement Team and Tasks.
12. TPF 6 – Curriculum Vitae for Proposed Professional Staff.
13. **Bid security in the prescribed form, amount and validity period (ITB Clause 15.1 of the Bid Data Sheet);**
14. Duly notarized Omnibus Sworn Statement (sample form – Form No. 6)
15. Duly notarized Secretary's Certificate attesting that the signatory is the duly authorized representative of the prospective bidder, and granted full power and authority to do, execute and perform any and all acts necessary and/or to represent the prospective bidder in the bidding, if the prospective bidder is a corporation, partnership, cooperative, or joint venture (sample form – Form No. 7)

Class "B" Documents

16. Valid joint venture agreement (JVA), in case the joint venture is already in existence. In the absence of a JVA, 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 instance that the bid is successful shall be included in the bid. Failure to enter into a joint venture in the event of a contract award shall be ground for the forfeiture of the bid security. Each partner of the joint venture shall submit the legal eligibility documents. The submission of technical and financial eligibility documents by any of the joint venture partners constitutes compliance.

ITB No. 2014-4-002

The SECOND ENVELOPE shall contain the following Technical Information/Documents

1. TPF 1 – Technical Proposal Submission Form
2. TPF 3 – Detailed Response to the TOR, if necessary
3. TPF 4 – Description of the Methodology and Work Plan for Performing the Project
4. TPF 7 – Time Schedule for Professional Personnel
5. TPF 8 – Activity (Work) Schedule
6. Executive Summary
7. Detailed Point-by-Point Response to Project Objectives and Deliverables
8. Scope of Services
9. Deliverable Items Summary
10. LBP responsibilities
11. Assumptions
12. Schedules
13. Exchange of confidential information, and other agreements
14. Organizational chart for the project
15. List of projects and project Team information using the Project Team Information Form (*Appendix A*)
16. Brief Company Profile
17. Analyst research reports, articles, brochures, white papers and other relevant materials

The THIRD ENVELOPE shall contain the following Information/Documents:

1. Duly filled out FPF1, FPF2 and Section 6.0 – Payment Milestones of the TOR duly signed by the bidder's authorized representative.