



PEF MIS: Information Systems Solutions

TERMS OF REFERENCE

1. Background

About PEF

The Peace Equity Access for Community Empowerment Foundation (Peace & Equity or PEF) is an independent non-profit foundation established in October 2001 to manage an endowment fund for civil society-led programs that would empower the poor and the marginalized in Philippine society.

About the Project

One of the components of PEF's institutional monitoring & evaluation system is the development of a management information system that will produce meaningful and useful information to monitor progress, measure performance, detect trends, evaluate alternatives, and make decisions and take corrective action.

However, given the felt inadequacy of existing information systems of PEF, it has undertaken a process of developing an integrated MIS Plan. Based on an evaluation of current systems in terms of development and maintenance, technology infrastructure, and data quality, PEF has identified application systems and the corresponding Key System Requirements (KSR). PEF will prioritize three (3) major systems: (1) Project Information System and (2) Knowledge Management System (with a sub-module on Document Management), for proceeding to Solutions Search Stage and (3) the Resource Planning System (FACT Software) for solutions upgrading and integration.

The KSR document will be used to search for solutions for the said priority systems that are available in the market. The solutions will be evaluated to arrive at a shortlist, which will go through a more detailed business process matching review and gaps identification. This stage will result to the selection of the final solutions.

2. Systems Solution Requirement

PEF seeks to engage with a vendor or vendors who can provide either software package or customized solutions for all or any of the above 4 major systems. The vendor/s must show the alignment of their proposed solution/s with the attached KSR.

The vendor/s should likewise show their competence in developing and implementing such solution/s successfully based on their list of successful projects and clients actively using their solution/s.

The vendor/s must have the following basic qualifications:

- a. A registered company, specializing in MIS solutions, with an established track record in providing MIS services.
- b. At least 3 years of continuous operations in providing systems solutions and services.
- c. Adequate management and financial capability to undertake the engagement.

3. Scope of Work

Based on an agreed methodology and timetable, the vendor/s will:

- a. Submit a proposal, showing the overview of the solution/s, and whether the solution/s meet the KSR items; should the solution/s not meet a KSR item, this is considered a gap, and the vendor must indicate whether they have a workaround or customized solution to address the gap;
- b. Provide estimated costs for the solution/s for budgetary purposes;
- c. Should the software package solution and vendor be included in the shortlist, present the proposed solution in more detail (assumed business processes, sample screens, sample reports, embedded controls, built-in module integration, and features aimed at improving efficiencies) to the PEF Bids and Awards Committee; and
- d. Should a customized solution and vendor be included in the shortlist, present their capability to develop and implement such solution, and the estimated timeframe and costs

Please refer to the attached bid document for guidance.

4. Responsibilities of PEF

PEF will provide the following:

- a. Bid documents including Key System Requirements document
- b. Clarifications to questions on the bid guidelines and KSR from the vendors
- c. Appoint Ms. Laurinette A. Gonzalez, Senior MIS Officer, as the focal person for PEF for this engagement
- d. Timely communication of status of the activities and decisions to participants in the bid process

5. Submission Requirements

- a. Bid submission form
- b. Technical requirements
- c. Cost proposal
- d. Company profile with description of similar experience
- e. Reference list with details of previous contracts in the same field with description and amounts
- f. Financial details and information