**Schedule B**

**Technical Proposal**

**Provision of Comprehensive Cloud-based Digital Platform**   
**for Gerontech Education and Rental Service *(RFP Ref: HKCSS-RENTAL-SYSO39)***

The Vendor is required to complete all the following sections in this proposal with detail information:

1. Functional requirements checklist compliance
2. Reporting
3. Project Schedule
4. Proposed Solution
   1. Overview
   2. System requirement
   3. Architecture
   4. Detail Solution
   5. Solution of Interface
   6. Solution of Reporting
   7. Risk management
      1. Backup and Recovery Strategy
      2. Resilience
      3. Contingency
      4. Scalability
      5. Data Conversion approach
      6. Security
   8. Solution of Optional items
5. Implementation Service
   1. Project Management Methodology
   2. System implementation service planning
   3. Outsourcing
   4. Training
   5. Documentation and Deliverables
   6. Project Evaluation
6. System Support, Maintenance services and major enhancement services
   1. Availability
   2. Maintenance
   3. Warranty
7. Demonstration Plan
8. Other Relevant Information

All requirements stated on this page and all tables to be completed are mandatory for this RFP. The fee proposal will only be opened with full compliance of the Functional Requirements Checklist of technical proposal including comply with all mandatory requirements (marked with “M”).

Vendors are to design the relevant procedures, provide the documentation describing the approaches, and most important of all, ensure that their proposed approaches can actually achieve the purpose.

1. **Functional Requirements Checklist Compliance**

Vendors must complete the Schedule A – “Functional Requirements Checklist” and submit it together with Technical Proposal.

(\* Please tick the appropriate.)

We confirm that our proposal comply fully with the required specifications.

We confirm that our proposal does not comply fully with the required specifications, in the following aspects:

Please include a detailed explanation of features/functions you can offer. Please also provide details on additional features or functions, exclusive of specified needs that may be requested, that may provide a distinct value to the association.

1. **Reporting**

(\* Please tick the appropriate.)

I/We confirm that our proposed solution is equipped with a reporting tool or a business intelligence tool.

I/We confirm that our proposed solution is NOT equipped with any reporting tool nor any business intelligence tool.

1. **Project Schedule**

Please provide the project schedule by Month Number, e.g. Month 1 is the 1st month since the formal project commencement.

Phase 1 of the project is required to be completed within 8 months, excluding the System nursing and free warranty period. HKCSS prefers the System to go live **before 31 Novemeber 2025.**

Phase 2 of the project is required to be completed within 15 months, excluding the System nursing and free warranty period. HKCSS prefers the System to go live **before 31 July 2026.**

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| # | Milestone (Major task) | From  (Month No.) | To  (Month No.) |
| Preparation & Development Strategy | | | |
| 1 | Existing System Review |  |  |
| 2 | Gap Analysis / User Requirement Collection |  |  |
| 3 | Workflow Design and Prototyping |  |  |
| Phase 1 System Installation / Customization / Development | | | |
| 4 | CRM |  |  |
| 5 | Form & Survey |  |  |
| 6 | Website / Content Management |  |  |
| 7 | Chatbot / Live Chat |  |  |
| 8 | Inventory Module |  |  |
| 9 | Rental Module |  |  |
| 10 | Cleaning and Repair Module |  |  |
| 11 | Delivery Module |  |  |
| 12 | Marketing and Event |  |  |
| Phase 1 Testing & Launch | | | |
| 13 | System & Integration Test / User Acceptance Test / Risk Assessment |  |  |
| 14 | Implementing Mitigation Measures |  |  |
| 15 | User Training |  |  |
| 16 | System Live Run |  |  |
| Phase 2 System Development / Enhancement | | | |
| 17 | Project Evaluation |  |  |
| 18 | System Development / Enhancement by modules |  |  |
| Phase 2 Testing & Launch | | | |
| 19 | System & Integration Test / User Acceptance Test / Risk Assessment |  |  |
| 20 | Implementing Mitigation Measures |  |  |
| 21 | User Training |  |  |
| 22 | System Live Run |  |  |
| Post Launch (Phase 1 + 2) | | | |
| 23 | Continuous Maintenance |  |  |
| 24 | System Nursing |  |  |

1. **Proposed Solution**

The Vendor must provide a high level solution that can fulfil the functional and technical requirements of this project in this section. Any salient features should be emphasised.

* 1. **Overview**

The Vendor must provide an overview of the proposed solution including any salient feature, advantages, strengthen, etc. The Vendor must also indicate the total man effort required for this project.

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* 1. **System Requirements**

The computer solution proposed by the Vendors must comply with the following system requirements, but not limited to:

* The entire System should be web-based system and support responsive operations for IOS and Android mobile phones and tablets.
* Support Client Side Web Browser (open standard) including and not limited to some common browsers such as Chrome, Safari, Firefox and MS Edge.
* For any request from clients, for example to do an enquiry/search, to save a record, to print contracts, invoices etc., refresh screen, the average System response time should be less than 5 seconds unless due to network or non-server side relevant hardware.
* Web mobile accessibility as per Digital Policy Office guidelines.

The Vendor must describe how the solution complies with the stated system requirements:

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* 1. **Architecture**
* Hardware and software. Vendors would need to make a proposal on hardware and software configuration which should also include a fair assessment on such hardware and software configuration to ensure that the proposed solution/software product is compatible and with sufficient capacity. Vendors can make a recommendation that is most suitable for project requirements: be it a Cloud Computing Services including Cloud Infrastructural services, Platform Service or Application Service or a Data Centre Hosting Service.
* System architecture, including networking – the Vendors shall provide a detailed architecture and description of each proposed elements of the proposed solution.
* System software and development testing tools
* Database Management System (DBMS) and databases

The Vendor must describe the hardware and software architectures of the solution, and application framework:

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* 1. **Detail Solution**

The Vendor must provide a detail planning and description of the solution that can exhibit how to fulfil the mandatory and 2nd phase requirements of this RFP, how to improve operation efficiency and achieve the project objectives.

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* 1. **Solution of Interface**

The Vendor must provide a detail description of the solution of interface with external systems. It should include but not limited to integration approach, technology to be used, etc.

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* 1. **Solution of Reporting**

The Vendor must provide a detail description of the solution of reporting. It should include but not limited to reporting tool, its feature, support of format, batch or online generation, etc.

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* 1. **Risk Management**

The Computer Solution will quickly evolve into integral mission-critical components of the operation of The Hong Kong Council of Social Service. Suppliers must consider risk management seriously to make adequate and justifiable proposals in this connection. Suppliers’ proposals must at least cover the following areas:-

Please state your proposed approach for risk management in terms of availability and data security level.

* + 1. **Backup and Recovery Strategy**
* Full backups and off site backups are preferred.
* The approach, including the media, tool, frequency, retention period, etc., is to be proposed.
* Suppliers are to propose how to recover a crashed System in the most effective manner.

The Vendor must provide a detail description of the backup and recovery strategy of this solution. It should demonstrate how to prevent data loss and to recover the data.

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* + 1. **Resilience**
* Vendors should propose the way to recover the System in case of any incident.
* Please note that the approach, required equipment and how they should be configured are to be proposed.
* The System, in their entirety, must not allow single points of failure to stop them from service outage.

The Vendor must provide a detail description of the resilience feature of the solution that can minimize data loss and services interruption.

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* + 1. **Contingency**
* Vendors must design alternative (manual) operation procedures so that in any unfortunate events of System failure, HKCSS could adopt the alternative procedures to continue its business.
* Vendors must also detail the approach for recovering the System in case of failure. The maximum downtime to be expected must be specified.
* Clearly documented procedures, guidelines and training must be included as part of the project deliverables.
* HKCSS may request the Vendors to demonstrate that their proposed approach works as expected by performing a recovery drill.

The Vendor must provide a detail description of the contingency planning in any unfortunate events of system failure.

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* + 1. **Scalability**

The Vendor must provide a detail description of the scalability feature of the solution that can scale up the System to meet the additional workload in the future.

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* + 1. **Data Conversion Approach**

The Vendor must provide the detail description of the data conversion approach, including transmission security.

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* + 1. **Security**

Vendors need to ensure all the sensitive data should be protected in a safe manner.

1. Transmission Security

* Virtual Private Network (VPN) will be established to help protect the System from unexpected intrusion and information leakage.
* Vendors are to propose a secure connection method for any data interchange across systems, Web Application Firewall (WAF) shall be proposed for governing the traffic traveling to the web application.
* Vendors are to propose other effective means, possibly including data encryption (Vendors to specify), user authentication, audit trail (access and transaction) etc., to protect against unauthorized access to the Solution and the stored information.
* Vendors are to propose an effective and appropriate anti-virus protection mechanism.
* System security, recovery and backup – Vendors should analyze the possible security holes and troubles in the System and provide perfect security measures and implementation proposal based on the service characteristics and the System conditions.

1. Personal Data Handling

* HKCSS respects personal data privacy seriously.
* Vendors must demonstrate their proposed solutions have included appropriate protective mechanism for data privacy; and the data policy and code of practice have adequately taken care of the relevant requirements in this connection, with reference, including but not limited to privacy audit, Best Practice Guide for Mobile App Development by the Office of the Privacy Commissioner for Personal Data, and the Personal Data (Privacy) Ordinance.

1. System Security

* Vendors need to identity the overall System vulnerability and adopt appropriate technology to avoid hackers’ attack.
* Vendors must adopt appropriate data security technology such as encryption to protect the database.

The Vendor must provide a detail description of the security features of the solution. It should include but not limited to protecting data, password, access control, security in communication, etc.

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* 1. **Solution of Optional Items**

The Vendor can provide the solution of the optional items (marked as “O” in “P” column in Schedule A – “Requirements & Specifications”) for HKCSS consideration.

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1. **Implementation Services**

Vendors need to provide a best fit implementation planning that should include and not limited to the following:

* Installation Plan
* Training Plan - Adequate face-to-face user training sessions should be provided to all relevant users in HKCSS and operating partners to help them master the required skills in using the proposed System. Vendors must provide relevant manuals specific to the context of HKCSS for the training. The documents should include at least the (a) User Manual, and (b) System Administration Manual. These documents should be updated whenever the details have been modified due to changes to the System or the associated operation procedures.
* Testing and Acceptance plan
* Database Setup Plan (if applicable)
* Other areas not specified above
  1. **Project Management Methodology**

Vendors must adopt a well-recognized and generally-accepted project management methodology for managing the Projects so as to ensure that the Projects would be delivered successfully. Appropriate, regular and effective reporting to HKCSS is expected. Details of all such control measures are to be fine-tuned and agreed at the project initiation stage but base on the proposals of the Vendors as stated in their proposal response.

The project management methodology should emphasize on how the Vendors would manage deviations from agreed project plans. Proper project monitoring is to ensure that the proposed System would be implemented within the project budgets with reasonable quality in the pre-defined timeframe.

Vendors are requested to propose a comprehensive approach to system change management that aligns with the project's objectives. This proposal should include methodologies for identifying, assessing, and implementing changes, as well as strategies for stakeholder communication and post-implementation evaluation.

All major project variations must be pre-approved mutually between the Vendors and HKCSS or else it would be solely the responsibility of the Vendors to rectify the situation at its costs.

Please describe the project management methodology which will be adopted.

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IT Professionals to be assigned to this project

* Vendors must submit the resumes of their major project team members for reference.
* Vendors are to propose their project team structure, with an estimate of how much resources, of various seniority and position, would be committed to the Project. Vendors must ensure that it will be a relatively stable structure throughout the project duration. HKCSS will not be responsible for any resources required due to staff turnover in the Vendors’ project team.
* HKCSS reserves the right to request for changing any member in the Vendors’ project team, without the need to give any explicit reason.
* The Vendors would be responsible for monitoring their own resources to deliver all the agreed project deliverables.

Please provide project team structure and information for reference:

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* 1. **System Implementation Services Planning**

The Vendor must provide a detail description and start/end date of the implementation services of this project including but not limit to project management procedure, change control procedure, business process review procedure, etc.

|  | **Activity description** | **Start Date** | **End Date** |
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* 1. **Outsourcing**

Outsourcing of System development work should be reported to HKCSS. In any case, the Vendors remain solely responsible for the delivery of the awarded Contracts.

Please provide outsourcing details if any:

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* 1. **Training**

At least 4 user training sessions should be provided to all relevant users in the project to help them master the required skills in using the proposed Systems in each phase.

The Vendor must provide a detail description of the training services to be provided for this project.

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* 1. **Documentation and Deliverables**

The Vendor must list out the documentation to be provided in this project. These documents should be updated whenever the details have been modified due to changes to the System or the associated operation procedures. Please state if the following documentation/deliverables will be provided and a brief description of the purpose of the document should be provided.

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| **Documentation/ Deliverables** | **Comply** | **Description** |
| Project Initiation Document |  |  |
| User Requirement Specification/Gap Analysis Report |  |  |
| Functional Specification |  |  |
| Technical Specification |  |  |
| Prototype |  |  |
| User Acceptance Test Plan |  |  |
| User Manual |  |  |
| Application Operation Manual |  |  |
| Disaster Recovery Plan & Procedures |  |  |
| Disaster Recovery Drill |  |  |
| User Training |  |  |
| System Nursing |  |  |

* 1. **Project Evaluation**

Vendors are expected to submit project completion/evaluation reports when the project completes. Evaluation of the System will involve whether the System are delivered on time, whether all the spelt-out requirements have been met, whether the project costs have been managed properly, and whether the project objectives have been met, etc.

More importantly, the evaluation reports should recommend positive ways to raise further the effectiveness in using the System and lessons learnt during the implementation of the System.The Project Evaluation report shall be completed before the end of the nursing period.

Please provide project evaluation plan:

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1. **System Support, Maintenance Services and Major Enhancement Services**

The Vendor must provide a detail description of the system support and maintenance services of this project. Vendors need to prepare and update the best fit Service Level Agreement (SLA) and scope throughout the support period and propose scope for 3 years other than the implementation period.

**6.1 Availability**

Vendors need to provide a high availability for the operation. Normal operating hours of the service is 9 hours x 6 days a week. Normal operating hours of the system is proposed to be no less than 20 x 7 days a week. Up time will be no less than 99.9%. No more than 2 hours of service interruption should be allowed with Vendors intervention and on-site/remote support. Please stated your compliance and planning on the availability:

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* 1. **Maintenance**
* Free version upgrade and installation of bug-fixing patches, and the corresponding documentation to be carried out within one month and may need to be conducted during non-office hours including Sundays and public holidays.
* Refreshment courses on how to use the System.
* Offers regarding out-scope services.
* At the end of the project period, one set of the source code with accompanying documentation and maintenance know-how is to be turned in to HKCSS for free.
* Notes on definition of additional tasks, if any, and pricing

Helpdesk services: (Service hours, Response time of calls & resolution time to issue severity should be specified.)

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Free version upgrade and installation of bug-fixing patches, and the corresponding documentation:

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Refreshment courses on how to use the System:

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Offers regarding out-scope services:

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On-site support services:

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Nursing Period

The Vendors shall provide system nursing support of the rolled out applications for **3 months**, including but not limited to the following:

* Perform bug fixing and provide on-site support, if necessary, to solve all application related problems of the System;
* Provide on-call services; responding to the problem call within 30 minutes and commence investigation of the problem within 2 hours;
* Produce problem logs and statistics for inspections by HKCSS Representative.

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| The Supplier shall provide system nursing support of the rolled out applications for       months. |

Other (such as support team structure, service level agreement, scope of services, system maintenance cycle, enhancement, etc.

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**6.3 Warranty**

* The Vendors shall provide the nursing period, warranty and maintenance after system roll-out.
* The Vendors must offer at least 1-year free warranty period.
* The Vendors undertake the responsibility of providing free of charge technical support service, rendered by qualified technical support staff, during the warranty period of the System.
* The Vendors should submit in the Fee Proposal breakdown of maintenance cost for the following 4 years for normal office hour maintenance service and after-service hour emergency maintenance.

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| The duration of free warranty period upon the completion of the project will be       months, after the nursing period. |

Please state the warranty detail:

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1. **Demonstration Plan**

The Vendor can provide a demonstration plan to HKCSS at the RFP evaluation stage.

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1. **Other Relevant Information**

The Vendor can provide any additional information that could help HKCSS to evaluate the proposal.

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-- End --