**The Hong Kong Council of Social Service**

**Ref. no.:** **TWTL/FinLit/ME-2025**

**Project: District-based Public Education Campaign of Treasure Wealth, Treasure Love – Family Financial Education Programme - Project Management, Design & Floor Planning, Venue Set Up, Decoration and Production**

**Summary**

|  |  |
| --- | --- |
| RFP NUMBER: | TWTL/FinLit/ME-2025 |
| DESCRIPTION: | Financial literacy can be strengthened through financial education. Supported by DBS Foundation, “Treasure Wealth, Treasure Love – Family Financial Education Programme講心又講金－家庭理財教育計劃” is launched in November 2024, which aims to provide a holistic service intervention which helps to improve low-income families and vulnerable groups’ awareness and understanding on family financial planning, acquire and practice money management skills, and cultivate a culture of financial transparency among family members, encourage the open discussion, thus to improve their financial wellbeing and family resilience in long-run.  To raise the awareness of financial wellbeing and family perspective financial decision making in the community, 8 district-based thematic events will be organised under the theme of promoting family financial literacy and wellbeing and encouraging family communication, and outreach to 20,000 participants across eight districts which are recorded with higher proportion of low-income households. |
| PUBLISH DATE: | 15 January 2025 (Wednesday) |
| CLOSING DATE / Time: | 7 February 2025 (Friday) / 12:00noon |
| BRIEFING SESSION: | Date: 17 January 2025 (Friday)  Time: 11am to 12noon *(Zoom conference call)* |
| TENDER INTERVIEW | Date: 13 February 2025 (Thursday) *(Details to be confirmed)* |
| BID RESPONSES MUST BE  HAND DELIVERED /  COURIERED TO: | The Hong Kong Council of Social Service (HKCSS)  **The Tender Box,** 13/F, Duke of Windsor Social Service  Building, 15 Hennessy Road, Wanchai, Hong Kong  *(3 sets of Proposal Document in hard copy + 1 USB with a set of Proposal Document)* |
| ATTENTION: | Ms Antonia CHAN, Family & Community Team |

**Table of Contents for Ref. No.: TWTL/FinLit/ME-2025**

1. Introduction

2. Specification

3. Tender Questionnaire

*Appendix*

1. Interpretation
2. Invitation to submit Proposal
3. Proposal and Preparation
4. Cost Prices
5. Information to be supplied by Candidates
6. Complete Offer of Services
7. Candidates’ Proposals
8. Acceptance
9. Proposal Documents Addenda
10. Equipment and Services Marketed by Other Parties
11. Offer of Products and Services
12. Provision of Everything Necessary
13. Company Status
14. Candidates’ Inquires
15. Candidates’ Response to Inquires
16. Participation from HKCSS
17. Personal Data Provided
18. Confidentiality
19. Prevention of Bribery Ordinance
20. Force Majeure
21. Evaluation Criteria
22. Payment Schedule
23. **Introduction**

**The Hong Kong Council of Social Service (HKCSS)**

The HKCSS is a statutory body established in 1947. Together with our Agency Members, we uphold social justice and equality in our mission to advance the well-being of the Hong Kong community. The HKCSS is committed to building an impact-oriented, collaborative and innovative social service sector, and co-creating a better society with stakeholders across different sectors. The HKCSS has over 510 Agency Members, with service units throughout Hong Kong, providing high-quality social services to those in need.  
  
**Project Name**District-based Public Education Campaign of Treasure Wealth, Treasure Love – Family Financial Education Programme - Project Management, Design & Floor Planning, Venue Set Up, Decoration and Production (“**the TWTL Project**”)

**Project Description**To raise the awareness of financial wellbeing and family perspective financial decision making in the community, 8 district-based thematic events will be organised under the theme of promoting family financial literacy and wellbeing and encouraging family communication, and outreach to 20,000 participants across eight districts which are recorded with higher proportion of low-income households.

These thematic events will be designed and featured the gamified educational content, interactive and fun-filling game stalks, activities associated with family financial wellbeing and mini financial literacy lecture. Content, format, mode of delivery and operating scale of the events/activities will be adjusted accordingly due to the needs of different districts.

**Aims**

* To enhance understanding on financial literacy and financial health
* To enhance awareness on the financial health of their families
* To promote family financial communication and resilience

**Project Date and Time**

1 June 2025 to 30 June 2026 (for eight events)

11 am to 6pm (depends on the venue availability)

**Participants (for Event only)**

Total: 20,00 participants (man-time) or above

**2. Specification**

The Awarded Party/Parties shall provide all necessary goods, services and labour for the satisfactory coordination and completion of the project to meet our below requirements.

The Proposal documents shall be inclusive of all labour, goods, equipments, services and other items necessary for the proper execution and timely completion of the TWTL Project.

*Details please refer to Appendix I: TWTL\_Requirements and Specifications\_2025*

**The Hong Kong Council of Social Service**

**Ref. no.: TWTL/FinLit/ME-2025**

**Project: District-based Public Education Campaign of Treasure Wealth, Treasure Love – Family Financial Education Programme - Project Management, Design & Floor Planning, Venue Set Up, Decoration and Production**

1. **Tender Questionnaire**

**Company Information**

|  |  |
| --- | --- |
| Name of Company |  |
| Address |  |
| Business Registration No. |  |
| Duration in Present Business |  |
| Senior Staff of the Company |  |

Details of Principal Contact

|  |  |
| --- | --- |
| Name |  |
| Position |  |
| Telephone |  |
| E-mail |  |

**Experience and Personnel**

**Company Profile**

Provide a brief company profile

|  |
| --- |
|  |

**Company Experience**Provide case studies for projects of a similar scope and scale that have been delivered by you company within the last three years that company has successfully delivered services within a tight timescale and demonstrated good value for money.

|  |
| --- |
|  |

**Technical Proposal**

Approach and Methodology  
Provide a description on the project approach and methodology

|  |
| --- |
|  |

Project ScheduleProvide your proposed schedule for the design and delivery of the services (including the date, venue and expected number of participants of each event) detailed in the tender invitation.

|  |
| --- |
|  |

Cost Breakdown

Provide an indicative breakdown of your proposed cost for the services required.

|  |
| --- |
|  |

**Certification**I certify that the information provided within this tender questionnaire, is accurate

|  |  |
| --- | --- |
| Name |  |
| Position |  |
| For and on behalf of |  |
| Date |  |

|  |
| --- |
| **Appendix** |

1. **Interpretation**

In all Proposal Documents, unless the context otherwise requires:

|  |  |
| --- | --- |
| “Awarded Party” | means a Candidate whose Proposal is accepted; |
|  |  |
| “Candidate(s)” | means the person or people and/or the firm or the company who has submitted a Proposal in compliance with the requirements laid down in the Proposal Documents; |
|  |  |
| “Closing Date” | means the latest date and time by which a Proposal must be received by HKCSS which is 12:00 noon sharp on 7 February 2025 (Friday). In case a black rainstorm warning or typhoon signal No.8 or above is hoisted, the Closing Date will be extended to 12:00 noon sharp on the next business day (except Saturday); |
|  |  |
| “Contract” | means a contract for **the TWTL Project** in a form and substance similar to the Conditions of Contract to be entered into between an Awarded Party and HKCSS, and reference to the terms thereof shall include the Proposal Documents unless inconsistent with the context of such reference, in which case the terms of the Contract shall prevail. The Contract shall include, inter alia, the Proposal Documents and an Awarded Party’s related submissions (if any); |
|  |  |
| “Proposal” | means all required information duly completed and submitted by a Candidate and shall include, where necessary and/or applicable, all subsequent information and documents submitted; such a Proposal shall constitute an offer from the Candidate submitting such Proposal which may be accepted by HKCSS within the period stipulated in Clause 13; |
| “Proposal Documents” | means the complete set of three contract documents comprising (a) Form of RFP; (b) Tender Questionnaire; and (c) Requirements and Specifications for **the TWTL Project**; |
|  |  |
| “Representative” | means the representative of HKCSS who will be conducting the RFP process; |
|  |  |
| “Services” | means the supply of all parts or parts of the service of **the TWTL Project** as specified in the Proposal Documents; |

1. **Invitation to submit Proposal**
   1. Proposals are invited from Candidates for the supply of the Services to be delivered subject to and in accordance with the terms and conditions laid out in the Proposal Documents.
   2. Proposals submitted by Candidates will be vetted by HKCSS.
   3. After the vetting of the submitted Proposals and decisions made, an Awarded Party shall enter a Contract with HKCSS.
   4. Acceptance of the Proposed Project from an Awarded Party by HKCSS shall be by way of the issuance of a Letter of Acceptance by HKCSS.
2. **Proposal and Proposal Preparation**
   1. Proposals must be related to the supply of all (or any part) of **the TWTL Project** as specified in the Proposal Documents.
   2. Proposals and all accompanying documents must be completed in English and submitted in the manner stipulated in the Form of RFP. Candidates shall submit their Proposals in three copies on or before the Closing Date. Proposals are to be completed in ink or typescript. Proposals not so completed may not be considered.
   3. The Form of RFP shall not be altered by the Candidate. Any modification considered necessary by the Candidate should be the subject of a separate document accompanying Proposal. Figures should not be altered by erasure. Any alteration should be affected by striking through the relevant figures and inserting the amendment figures in ink above the original figures. All such amendments should be initialed by the Candidate in ink.
   4. The Proposal shall reach HKCSS on or before the Closing Date and Time.
   5. A Proposal shall constitute an offer from a Candidate that shall remain open for not less than 90 days after the Closing Date. If any Candidate is unable to comply with this requirement, he must clearly state the period for which his Proposal is valid for acceptance in his Proposal. If an offer is withdrawn before the expiry date of the agreed validity period, due notice will be taken of such action.
3. **Cost Prices**
   1. The prices to be quoted by Candidates are to be in Hong Kong dollars and must be shown on the Price Schedule. Such prices should be net prices already allowed for all trade and cash discounts. Any price terms on which the quotation is based must be clearly stated in the Proposal.
   2. Prices quoted

It will be assumed, unless Candidates clearly stipulate otherwise, that all prices quoted will remain valid for the full duration of the Contract. No request for price variation will be considered. If, however a Candidate wishes to submit a conditional offer that contains a price variation clause, he may do so with the clear understanding that such an offer may prejudice the award of a Contract. The prices quoted in the Price Schedule shall be inclusive of all insurance and delivery charges, if any.

* 1. Accuracy of Prices quoted in Proposals

Candidates should make certain the prices quoted are accurate before including them in their Proposals. Under no circumstances will any request be accepted for price adjustment on the grounds that a mistake has been made with the prices quoted in the Proposal.

* 1. Payments will be made in Hong Kong Dollars.

1. **Information to be supplied by Candidates**
   1. The following information shall be submitted together with the Proposal (hereinafter referred to as the Candidate's Submission). Further, the Candidates shall supply all other information that is not mentioned here but is required in the Proposal Documents. A Candidate's Submission may be considered invalid, and the Candidate will be disqualified if any of the information is not submitted.
   2. Statement of Compliance  
      Candidates shall submit a clause-by-clause statement of compliance with their Proposals stating whether the offered services comply with the requirements laid down in the Proposal Documents. If a Proposal does not conform in any particular aspect, the relevant Candidate shall provide full details of an alternative offer to such requirement. However, HKCSS reserves the right to accept or reject any such Proposal. Candidates shall also submit a description note to summarize their Proposals, highlighting the most important features and describe how the offered services can meet the requirements of the Proposal Documents.
   3. Price Schedule  
      Candidates must provide the Price Schedule, and all information required therein. Items in the Price Schedule should be fully priced and totaled. The Price Schedule must be duly signed by the Candidate with company chop.
   4. Service Provider Information  
      The information to be supplied by Candidates under Clause 13 herein.
2. **Complete Offer of Services**
   1. Candidates shall submit Proposals to meet all the requirements as stated in the Proposal Documents. Proposals with only a partial quotation will not be considered.
3. **Candidates’ Proposals**
   1. Counter proposals from Candidates will only be considered in exceptional circumstances and at the absolute discretion of HKCSS on the issue of fundamental importance to the Proposal Documents. Any counter proposal must be drafted and submitted in the following manner:
4. The counter proposal must be put under a separate appendix called “Counter proposal to the Proposal Documents”.
5. The counter proposal must adhere to the format of the Proposal Documents.
6. The original version of the relevant provision must be fully recited before any proposed alteration or deletion is made.
7. Any alteration to any terms or requirements must be underlined and must bear the corresponding clause number unless it is an addition to the Proposal Documents.
8. Words to be deleted should be crossed out by a single line only.
9. Explanation should be given below any such alteration or deletion and be put in a bracket ( ).
   1. A counter proposal not submitted in accordance with the above requirements will be considered to be general comments only and will not in any way affect the validity of any terms and conditions in the Proposal Documents.
   2. Alternative proposals that will improve the value of a Proposal may be submitted. HKCSS, through her Representative, reserves the right to negotiate with any Candidate about the terms of a Proposal.
10. **Acceptance**
    1. HKCSS is not bound to accept the lowest price or any Proposal at all and reserves the absolute right to accept all or any part or part of any Proposal at any time within the period mentioned in clause 4 hereof.
    2. HKCSS will enter into a Contract with the Awarded Party. Tenderers who do not receive any notification within the Tender Validity Period of their offer shall assume that their offers have not been accepted.
    3. Documents of unsuccessful Candidates will not be returned to the Candidates regardless of the result of bidding.
11. **Proposal Documents Addenda**
    1. All addenda to the Proposal Documents, if any, will be in writing and forwarded to all Candidates. Candidates must acknowledge receipt of all addenda.
12. **Equipment and Services Marketed by Other Parties**
    1. If any Proposal includes equipment and services marketed by other parties or companies, the proposing Candidate shall act as the prime contractor and the sole point of contact with regard to contractual stipulations including payment of all charges. In addition, an Awarded Party will be responsible for meeting all other requirements of the Proposal specifications.
    2. Use of sub-contractors/joint partners is allowed but must be clearly disclosed in the Proposal. All communications connected with or arising out of the Proposals shall be conducted directly between HKCSS and the Candidate(s) irrespective of the number of sub-contractors/joint partners proposed.
13. **Offer of Products and Services**
    1. Candidates shall declare that all the products and equipment used in supplying the Services will fit for the purpose(s) for which they are intended and further shall warrant that there is no infringement of copyright or patent or intellectual property rights of any kind or nature in connection with all the products and/or equipment whatsoever.
14. **Provision of Everything Necessary**
    1. Anything not specifically mentioned in the Proposal Documents but necessary for the fulfillment of the guarantees and requirements called for in any requirement specifications and/or the Contract, or necessary for the satisfactory working of **the TWTL Project** is to be provided under the Contract.
15. **Company Status**
    1. Candidates must provide full details as follows: -
16. Name and address of the Candidate
17. The duration it has been in present business
18. Senior Staff and Members of the Company
19. **Candidates’ Inquiries**
    1. Any inquiries from Candidates concerning the Proposal Documents or relating to any requirement specifications up to the date of lodging the Proposal shall be in writing and shall be submitted to: -

|  |  |
| --- | --- |
| Contact person: | Ms Antonia CHAN |
| Address: | Room 701, 7/F Duke of Windsor Social Service Building, 15 Hennessy Road, Wanchai, Hong Kong |
| Telephone: | 2876 2499 |
| Email: | antonia.chan@hkcss.org.hk |

* 1. All other inquiries will be responded to in written form via email.
  2. After the submission of a Proposal, Candidates shall not attempt to initiate any further contact, whether direct or indirect, relating to the Proposal or the Proposal Documents. HKCSS, through her Representative, shall have the sole right to initiate any such further contact. All contacts initiated by HKCSS and replies from the Candidates to such contacts shall be in writing.

1. **Candidates’ Response to Inquiries**
   1. In the event that clarification of any point of a submitted Proposal is necessary, the relevant Candidate will be advised in writing. Such Candidate shall clarify the queries within three working days in writing.
2. **Participation from HKCSS**
   1. Candidates should specify, if necessary, what participation and/or resource requirements they expect HKCSS to involve and/or commit. Agreement to such involvement and/or commitment is entirely at the absolute discretion of HKCSS.
3. **Personal Data Provided**
   1. Candidates’ personal data provided in the Proposals will be used for Proposal evaluation and Contract award purposes. If insufficient and inaccurate information is provided, such Proposal may not be considered.
   2. Candidates have the right of access and correction with respect to personal data as provided for in Sections 18 and 22 and Principle 6 of Schedule 1 of the Personal Data (Privacy) Ordinance (Cap. 486). The right of access includes the right to obtain a copy of the Candidate's personal data provided in the Proposal.
4. **Confidentiality**
   1. Every recipient of the Proposal Documents must keep the Proposal Documents confidential and must not disclose any of their contents to any other party without the prior written permission of HKCSS. The confidentiality must be maintained by all parties even after the entering into of a Contract with an Awarded Party.
   2. This set of Proposal Documents remains the property of HKCSS and HKCSS reserves the right to demand the return of the original and all copies of the Proposal Documents from all recipients of the Proposed Documents at any time.
   3. The Candidate/recipient who receives this set of Proposal Documents agrees to the confidentiality undertakings and return requirements stipulated above.
5. **Prevention of Bribery Ordinance**
   1. It is an offence under the Prevention of Bribery Ordinance that Staff member(s) accept advantages from suppliers and contractors, or the suppliers and contractors offer advantages to Staff member(s) relating to Council purchases. The Council should not permit its staff to receive advantages (including payment of commission) from suppliers and contractors. They should inform suppliers and contractors in writing that the offer of such advantages to Council staff relating to their official duties is illegal. This could be done by incorporating a statement in the terms of quotations and tenders.
6. **Force Majeure**
   1. Force Majeure means any unforeseen event beyond the control of the candidate and HKCSS. Such event may include, but is not restricted to wars and revolutions, fires, floods, epidemics (including but not limited to COVID-19)/pandemics, quarantine restrictions, strikes, lockouts, or acts of God.
   2. In case due to a Force Majeure event HKCSS is unable to fulfill its contractual commitment and responsibility, HKCSS will notify the candidate accordingly and terminate the contract with written notice.
   3. For the remaining productions, goods and services, HKCSS may decide to cancel the remaining portion of the productions, goods and services and compensate the candidate by paying an agreed amount for the cost incurred by the candidate towards the remaining portion of the productions, goods and services.
7. **Evaluation Criteria**
   1. The major evaluation criteria of RFP will include but not limited to:
      1. Quality of the Candidate’s Submissions
      2. Cost of the Candidate’s Submissions
      3. Ability to comprehend and deliver full services with professionalism (technical and project management)
      4. Proven track record and experience for the provision of similar services
      5. Have a good sense of understanding with and/or past experience working with the non-profit Sector
8. **Payment Schedule**
   1. Upon acceptance of the proposal, the contract sum will be paid in accordance with the following schedule:

|  |  |
| --- | --- |
| **Work Stage** | **Percentage of total sum payable** |
| Upon confirmation of the work schedule and satisfactory completion of floor plan, venue design and gamified content (around 1.5 months after the tender is awarded) | 40% of the total sum |
| Upon satisfactory completion of the 4th event | 20% of the total sum |
| Upon satisfactory completion of the 8th event | 40% of the total sum |

**--End--**