

**The Hong Kong Council of Social Service**  
**Ref. no. FLE SIA - 2024**  
**Project: Social Impact Assessment of Family-centric Financial Literacy**  
**Education Programme**

**Summary**

RFP NUMBER:	FLE SIA - 2024
DESCRIPTION:	Financial literacy can be strengthened through financial education. “The Family-centric Financial Literacy Education Programme” (“The Programme”) 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, thus to improve their financial wellbeing in long-run. We plan to engage a service provider to conduct a social impact assessment to review the outcome of the programme.
PUBLISH DATE:	11 November 2024 (Mon)
CLOSING DATE:	2 December 2024 (Mon)
CLOSING TIME:	12:00 Noon
TENDER INTERVIEW	Date: 10 December 2024 (Tuesday) Time: 2:30am - 4:30pm Format: Zoom meeting <i>(The zoom link will be provided two working days before the meeting)</i>
BID RESPONSES MUST BE HAND DELIVERED / COURIERED TO:	The Hong Kong Council of Social Service (HKCSS) <b>The Tender Box</b> , 13/F, Duke of Windsor Social Service Building, 15 Hennessy Road, Wanchai, Hong Kong
ATTENTION:	Mr. Jim Hoe, Family & Community Team

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## **1. Introduction**

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

The Hong Kong Council of Social Service (HKCSS) is a federation of non-government social service agencies of Hong Kong. We were established in 1947 with the aim of planning and coordinating large scale relief works and social welfare after the Second World War. In 1951, we became a statutory body under the Hong Kong Council of Social Service Ordinance, Chapter 1057 of the Laws of Hong Kong.

The Council has since become an essential partner of the Hong Kong Government in social welfare and development. Today we represent more than 520 Agency Members that provide quality social services through their 3,000 operating units in Hong Kong.

### **Project Name**

Social Impact Assessment of Family-centric Financial Literacy Education Programme

### **Project Description**

Financial Literacy can be strengthened through financial education. “The Family-centric Financial Literacy Education Programme” (“The Programme”) 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, thus, to improve their financial wellbeing in long-run. We plan to engage a service provider to conduct a social impact assessment to review the outcome of the programme.

## 2. Specification

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

### 1) Scope of Work

Please specify the below:

1. Literature Review and Contextual Analysis
2. Social Impact Assessment Framework Development
3. Questionnaires Development (Mixed-Model)
4. Stakeholder Engagement
5. Data Collection and Analysis
6. Impact Assessment
7. Reporting and Recommendations
8. The Project Team and their Profile
9. Brief Reference to Conducting Similar Projects

*Using a theoretical framework with empirical validation will be a bonus*

### Aims

The service provider should be able to guide us to:

- Evaluate the extent to which the programme has achieved its intended outcomes, including improvements in financial health, in terms of financial literacy, financial behavior, and overall family financial wellbeing. (Using a theoretical framework with empirical validation will be a bonus)
- Assess the extent to which the program has successfully promoted a culture of family financial transparency.
- Quantify the social and economic benefits derived from the programme, including changes in participants' financial habits, stress levels, and family cohesion.
- Provide actionable recommendations to enhance the programme's design, delivery, or impact.
- Offer actionable implementation to adopt the idea of family financial transparency.

### **Working Schedule:**

The study is to be completed by March 2028. Please enclose the project work plan for reference.

**The Hong Kong Council of Social Service**  
**Ref. no. FLE SIA - 2024**  
**Project: Social Impact Assessment of Family-centric Financial Literacy**  
**Education Programme**

### 3. Tender Questionnaire

#### Service Provider Information

Name of Service Provider	
Address	

#### Details of Principal Contact

Name	
Position	
Telephone	
E-mail	

#### Experience and Personnel

##### **Service Provider Profile**

Provide a brief organization profile

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##### **Service Provider Experience**

Please provide your track record of conducting social impact assessments.

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**Technical Proposal****Approach and Methodology**

Provide a description on the project approach and methodology

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**Project Schedule**

Provide your proposed schedule for the design and delivery of the services detailed in the tender invitation.

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**Price Schedule****Cost Breakdown**

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

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**Certification**

I certify 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 (time) sharp on (date). 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 **Project: Social Impact Assessment of Family-centric Financial Literacy Education Programme** 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 the complete set of three contract documents comprising (a) Form of RFP; (b) Tender Questionnaire; and (c) Requirements and Specifications for **Project: Social Impact Assessment of Family-centric Financial Literacy Education Programme**;
- “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 **Project: Social Impact Assessment of Family-centric Financial Literacy Education Programme** as specified in the Proposal Documents;



## **2. Invitation to submit Proposal**

- 2.1 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.
- 2.2 Proposals submitted by Candidates will be vetted by HKCSS.
- 2.3 After the vetting of the submitted Proposals and decisions made, an Awarded Party shall enter a Contract with HKCSS.
- 2.4 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.

## **3. Proposal and Proposal Preparation**

- 3.1 Proposals must be related to the supply of all (or any part) of the project – Project: Social Impact Assessment of Family-centric Financial Literacy Education Programme as specified in the Proposal Documents.
- 3.2 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.
- 3.3 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.

3.4 The Proposal shall reach HKCSS on or before the Closing Date.

3.5 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.

#### **4. Prices**

4.1 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.

#### 4.2 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.

#### 4.3 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 in the prices quoted in the Proposal.

4.4 Payments will be made in Hong Kong Dollars.

## **5. Information to be supplied by Candidates**

5.1 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.

### **5.2 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.

### **5.3 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.

### **5.4 Service Provider Information**

The information to be supplied by Candidates under Clause 13 herein.

## **6. Complete Offer**

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.

## **7. Candidates' Proposals**

**7.1** 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:

- a. The counter proposal must be put under a separate appendix called "Counter proposal to the Proposal Documents".
- b. The counter proposal must adhere to the format of the Proposal Documents.
- c. The original version of the relevant provision must be fully recited before any proposed alteration or deletion is made.
- d. 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.
- e. Words to be deleted should be crossed out by a single line only.
- f. Explanation should be given below any such alteration or deletion and be put in a bracket ( ).

**7.2** 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.

**7.3** 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.

## **8. Acceptance**

**8.1** 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.

**8.2** HKCSS will enter a Contract with an 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.

**8.3** Documents of unsuccessful Candidates will not be returned to the Candidates regardless of the result of bidding.

## **9. Proposal Documents Addenda**

All addenda to the Proposal Documents, if any, will be in writing and forwarded to all Candidates. Candidates must acknowledge receipt of all addenda.

## **10. Equipment and Services Marketed by Other Parties**

**10.1** 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.

**10.2** 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.

### 11. Offer of Products and Services

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.

### 12. Provision of Everything Necessary

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 Project: Social Impact Assessment of Family-centric Financial Literacy Education Programme is to be provided under the Contract.

### 13. Company Status

Candidates must provide full details as follows: -

- a. Name and address of the Candidate
- b. The duration it has been in present business
- c. Senior Staff and Members of the Company

### 14. Candidates' Inquiries

14.1 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:	Mr Jim Hoe
Address:	Room 1201, 12/F Duke of Windsor Social Service Building, 15 Hennessy Road, Wanchai, Hong Kong
Telephone:	2876 2483
Email:	<a href="mailto:jim.hoe@hkcss.org.hk">jim.hoe@hkcss.org.hk</a>

14.2 All other inquiries will be responded to in written form via email.

14.3 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.

### **15. Candidates' Response to Inquiries**

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.

### **16. Participation from HKCSS**

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.

### **17. Personal Data Provided**

17.1 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.

17.2 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.

### **18. Confidentiality**

18.1 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.

18.2 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.

18.3 The Candidate/recipient who receives this set of Proposal Documents agrees to the confidentiality undertakings and return requirements stipulated above.

## **19. Prevention of Bribery Ordinance**

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.

## **20. Evaluation Criteria**

The major evaluation criteria of RFP will include but are not limited to:

1. Price quoted in the Price Schedule of the Candidate's Submissions:
2. Quality of the Candidate's Submissions:
3. Ability to comprehend and deliver full services with professionalism (technical and project management)
4. Demonstrate proven experience in Social Impact Assessments with qualified team members.
5. Present information clearly and concisely and respond promptly to tender requirements and clarifications.

## **21. Marking Scheme for Tender Evaluation**

The person responsible will use this marking scheme for the assessment of tenders. Weighting of is assigned to the technical assessment and financial assessment respectively. The marking schemes are by three stages, including:

### **(1) Stage I – Technical Criteria Evaluation Stage**

In Stage I, the tenders will be assessed against the technical criteria (this item could be determined by referring to the points in the tenderers' performance according to the evaluation criteria) relative to the tenderers' quality and experiences. The tenders must attain an overall passing score. Tenders which fail to obtain a passing score in any one of the items will not be considered further.



## (2) Stage II – Financial Evaluation Stage

In Stage II, financial proposals of the tenders which have passed Stage I assessment will be assessed. A maximum financial score will be allocated to the tender that offers the lowest price. The financial score for each tender will be calculated by using the following formula:

$$\text{Financial Score} = \frac{\text{lowest price among those conforming tenders}}{\text{tender price}}$$

## (3) Stage III – Combined Technical and Financial Score Stage

In Stage III, based on the technical and financial assessments in Stages I and II, a combined score for a tender will be calculated as follows:

$$\text{Combined Score} = \text{Technical Score} + \text{Financial Score}$$

**22. Payment Schedule**

Upon acceptance of the proposal, the contract sum will be paid in accordance with the following schedule:

<b>Work Stage</b>	<b>Percentage of Lump sum payable</b>
Upon confirmation of the Social Impact Assessment proposal and work schedule	10% of the total sum
Upon satisfactory completion of the Baseline Data Collection	10% of the total sum
Upon satisfactory completion of the Interim Report	25% of the total sum
Upon satisfactory completion of the Data Collection of Service Users	25% of the total sum
Upon satisfactory completion of the Study and Final Report	30% of the total sum

--End--