Tender Briefing

Processing of Applications and Provision of Services for Elderly Persons Applying for/Receiving Old Age Allowance under the Fujian Scheme (2018 – 2021)

Tender Ref.: SWD/FJ Scheme (2018 - 2021)

14 June 2017
Agenda

- Tender Highlights
- Tender Evaluation
- Service Specifications
- Questions & Answers
Tender Highlights
Tender Schedule

Tender Issue Date

2 June 2017

Tender Closing Date

12:00 noon (Hong Kong Time) on 14 July 2017 (Friday)

[Late tenders WILL NOT BE CONSIDERED]

(page 4, 8 & 9 of the Tender Documents)
Tender Preparation and Tender Submission

Tenderer is required to submit the

- Technical proposal with Tender Form, and the
- Price proposal
- Each in triplicate placed and sealed in two separate envelopes
- Two envelopes must be put into one single large sealed envelope

[Tender will be disqualified if a duly completed and signed Part 4 “Offer To Be Bound” of the Tender Form is not submitted before the Tender Closing Date]

(page 8-10 of the Tender Documents)
Technical Proposal

Tenderer must:

Fill in Annex I to Appendix I with the following supporting documents for essential requirements screening and tender evaluation:

(a) brief history of the organization including without limitation the date of establishment and services provided since establishment;

(b) experience in providing social welfare services in Hong Kong. The periods and nature of services provided, types of clients served, and other relevant information should be stated;

(c) experience in providing social welfare services in Mainland China. The periods and nature of services provided, types of clients served, and other relevant information should be stated;

(page 19 - 26 of the Tender Documents)
Technical Proposal

Tenderer must (Cont’d):

Fill in Annex I to Appendix I with following supporting documents for essential requirements screening and tender evaluation (Cont’d):

(d) copy of a valid Business Registration Certificate of the Tenderer (if applicable); and

(e) copy of the current Articles of Association, the Certificate of Incorporation and/or any other documents evidencing the business status of the Tenderer.

Provide Operation proposal using the proforma set out in Annex 2 to Appendix 1 for tender evaluation

(page 19 – 26 of the Tender Documents)
Price Proposal

Tenderer must:

- provide Price Proposal;
- provide in separate sheets entitled ‘Price Proposal’ providing justifications, calculations (with breakdown of the charges) and supporting documents, where appropriate, to show how the amounts are arrived at;
- fill in the charges for ALL ranges of cases for each Contract Year;

(page 27-32 of the Tender Documents)
Tenderer (Cont’d):

shall tender the Price Proposal in Hong Kong dollars; and

is advised to read the payment provision at Clause (4) of Part 2: Conditions of Contract carefully before filling in the Price Proposal

(page 27, 52-54 of the Tender Documents)
The highest range of number of applications and number of recipients are for reference and for calculation of the Estimated Total Contract Value. The Government does not warrant, undertake or bind itself to provide the number of applications or recipients under the Contract.

(page 28-32 of the Tender Documents)
Tender Evaluation
Marking Scheme for Tender Assessment

5 Stages of Tender Evaluation:

- Stage 1 - Completeness Check
- Stage 2 - Essential Requirements
- Stage 3 - Technical Assessment
- Stage 4 - Price Assessment
- Stage 5 - Calculation of Combined Score

(page 33-34 of the Tender Documents)
Stage 1 - Completeness Check

Tenderer is required to submit:

(i) a duly completed Appendix 1 - Technical Proposal; and

(ii) a duly completed and signed Part 4 “Offer To Be Bound” of the Tender Form

(page 33 & 35 of the Tender Documents)
Stage 2 - Essential Requirements

The Tenderer must:

be a body corporate in Hong Kong (i.e. either a company incorporated under the Companies Ordinance (Cap.622) or the Predecessor Ordinance, or a statutory corporation established under the laws of Hong Kong); and

have experience in providing social welfare services in Hong Kong continuously for two years within four years immediately prior to the Original Tender Closing Date; and

have experience in providing social welfare services in Mainland China continuously for two years within four years immediately prior to the Original Tender Closing Date

(page 10 of the Tender Documents)
Marking Scheme for Tender Assessment (Cont’d)

Stage 2 - Essential Requirements (Cont’d)

- Tenderer is required to provide necessary information with supporting documents that it satisfies the essential requirements.

- Tenderer fails to meet any of the three essential requirements will not be considered further.

(page 36 of the Tender Documents)
Marking Scheme for Tender Assessment (Cont’d)

Stage 3 - Technical Assessment (Section I & II)

- Marks for each assessment criteria
- Tenderer must provide detailed information for each item as stipulated in Annex 2 to Appendix 1 – Operation Proposal

(Page 24-26, 37-38 of the Tender Documents)
Marking Scheme for Tender Assessment (Cont’d)

Stage 3 - Technical Assessment (Section I & II)(Cont’d)

Tenderer should:

- attain sectional passing marks;
- note the Explanatory Notes on Technical Assessment in their preparation of the proposals;
- note that “0” mark will be given if the plan/proposal is not practicable, or fails to provide information on any one of the listed items in the Notes.

(page 37-38, 40-42 of the Tender Documents)
Stage 3 - Technical Assessment (Section I & II) (Cont’d)

Tender failed to attain the sectional passing marks cannot proceed to Stage 4 - Price Assessment

(page 37-38 of the Tender Documents)
Marking Scheme for Tender Assessment (Cont’d)

Stage 3 - Technical Assessment (Cont’d)

Section III - Calculation of weighted technical score

A maximum weighted technical score of 30 will be given to the tender with the highest score while the remaining tenders will be given a weighted technical score.

(page 38 of the Tender Documents)

Weighted technical score of a tender that has passed Stage 1 to Stage 3

\[ \text{Weighted technical score} = 30 \times \frac{\text{Total technical marks attained by the tender being assessed}}{\text{Highest total technical marks among the tenders that have passed Stage 1 to Stage 3}} \]
Stage 4 - Price Assessment

- A maximum weighted price score of 70 is given to the tender which has passed Stages 1 to Stage 3 and proposes the lowest Estimated Total Contract Value.
- Other tenders will obtain the weighted price score by applying the following formula:

\[
\text{Weighted price score of a tender that has passed Stages 1 to Stage 3} = 70 \times \frac{\text{Lowest Estimated Total Contract Value among the tenders that have passed Stages 1 to Stage 3}}{\text{Estimated Total Contract Value of the tender being assessed}}
\]
Stage 5 - Calculation of Combined Score

Combined Score =

Weighted technical score (Stage 3)

plus

Weighted price score (Stage 4)

The tender with the highest combined score will normally be recommended for acceptance

(page 39 of the Tender Documents)
Service Specifications
Provision of Services

Processing of Applications:

- complete investigation within 30 days from date of referral
- prepare & submit report within 45 days from date of referral
- identify suitable agent for Applicant who is found to be mentally unfit and/or for Applicant who is mentally fit and needs an agent to collect allowance on his/her behalf
- act as applicant’s agent for collecting the allowance should a suitable agent cannot be identified

(page 69 of the Tender Documents)
Provision of Services (Cont’d)

Frontline casework services for recipients under the FJ Scheme

To conduct annual reviews of all FJ Scheme cases:

- **Annual spot check** by home visit
  - include all cases where the recipients are represented by agents
  - 20% of the remaining non-agent cases on a random basis

- **Annual postal review**
  - other than those selected for spot checks

To prepare and submit reports to SWD on results of all case reviews conducted in the above annual spot checks and postal review

(page 69-70 of the Tender Documents)
Provision of Services (Cont’d)

Frontline casework services for recipients under the FJ Scheme (Cont’d)

Other services:

- identify suitable agent
- assist in recovery of overpayment
- investigate into suspected fraud cases
- report changes
- handle enquiries

(page 70 of the Tender Documents)
The Contractor is required to appoint staff, on full-time basis:

One Programme Manager as officer-in-charge who must:

- have attained academic qualifications as stipulated in the Tender Documents (including a Bachelor’s degree or equivalent);
- have not less than 1 year’s continuous experience in the administration of welfare services; and
- be able to speak Cantonese and Putonghua

(page 70-71 of the Tender Documents)
Contractor’s Employees (Cont’d)

Caseworker must:

- have attained academic qualifications as stipulated in the Tender Documents; and
- be able to speak fluent Cantonese

One caseworker must be employed to handle up to but not more than 1,200 cases (including both applications and review cases) under the FJ Scheme at any one time

(page 71 of the Tender Documents)
Contractor’s Employees (Cont’d)

- **Clerk** must have:
  - attained academic qualifications as stipulated in the Tender Documents;

(page 71 of the Tender Documents)
Questions & Answers