

THE COLLEGE OF SURGEONS OF HONG KONG

GUIDELINES TO TENDERERS

1. BACKGROUND

The College of Surgeons of Hong Kong (“CSHK”) is a professional organization that conducts postgraduate training, professional examinations, and accreditation for surgeons in Hong Kong.

2. SERVICES REQUIRED

Tenders are invited from the Contractors to provide a full range of services for the development of the CSHK E-portfolio System, which is an integrated system to support CSHK’s administration, CME, training, and examination activities.

The Contractors are invited to tender for the provision of the following requirements. The list of requested requirements is not necessarily exhaustive and Tenderers are welcome to incorporate additional solutions for consideration which they believe would be required for the best practice and operation of the CSHK E-portfolio System.

Tenderers should indicate their capability to provide all the areas of services required, or the Tenderers must indicate both the fee and respective proposals in case they would sub-contract any or part of the roles. Tenderers should provide a realistic timeline for the provision of services to fulfill the following requirements.

2.1 User Requirements

Develop the E-Portfolio System (Website and Mobile Application for particular functional modules) to allow different types of members to perform specific functions online.

2.1.1 General Requirements

- a. The system shall support the following browsers in both desktop and mobile versions: IE 10 or above, Safari, Chrome, and Microsoft Edge and allow access from other parts of the world including China
- b. The system shall support Apple iOS and Google Android operating systems for smartphones and tablets.
- c. The system shall be deployed to the testing environment for testing purposes before its deployment to the production environment for production usage
- d. Provide end to end hosting solution including installation, maintenance, securing, monitoring, and reporting of the system and ensure compliance with local laws and regulations
- e. The source code of the whole project should be opened to CSHK and CSHK reserves the right to change the code for the same project in the future
- f. The ownership and intellectual property rights of all the content and data shall be vested in and belong to the CSHK. The Contractor shall ensure that no intellectual property rights of any third party have been and/or will be infringed and shall indemnify the CSHK against any claims for breach of intellectual property rights
- g. The copyright of all information provided by the CSHK shall be and remains the exclusive property of the CSHK and shall vest in the CSHK at the time it is generated

2.1.2 System Layout Design

- a. Develop the design layout (produce three (3) layout styles for selection) of homepage and sub-pages, including font style, colour palette, banner for information delivery
- b. Allow ongoing update and maintenance for the latest browsers and OS
- c. Homepage elements/modules, including but not limited to:
 - Banner, Inquiry Submission, Member login

2.1.3 Database(DB) Management System

- a. Build up a new Database Management System using Mysql or other relational databases
- b. Centralise and migrate all current databases into the new Database Management System

2.1.4 Content Management System for Administrator

- a. Create member and new member type
- b. Assign functional modules to each member type
- c. Batch send the account activation email to members (Filtering function required*)
- d. Customizable notice, reminder, pop-up message for members ((Filtering function required*)
- e. Manage all members' data including personal information, examination, training record, etc.
- f. Manage payment record
- g. Document management system
- h. Edit and create new Online Fillable Form#
- i. Fetch data from the database into Excel and PDF (Filtering function required*)
- j. Batch import and export information with sorting function (Filtering function required*)
- k. Generate various reports (e.g. Training report) (Filtering function required*)

For example: A **Training report** shows trainee's status on completing the workplace-based assessment, half-yearly assessment (with rating, no. of days absent), CME requirements, etc...

**Allow Administrator to select target group (e.g. by membership nature, admission date, etc...) and applicable fields (e.g. name, hospital, etc...) to generate the report
#Existing PDF Forms shall be converted into online fillable forms to fit the need of different functional modules*

2.1.5 Administrator and Member Type (Subject to change)

- a. Administrators
 - Super Admin (Full Access to all systems); College Admin (Access right subject to Super Admin's delegation)
- b. Members (Multiple types of members in one person is possible)
 - Basic Surgical Trainee (BST); Higher Surgical Trainee (HST); Examination Eligible Candidate (EEC); CME Event Organizer; Department Secretary; Ordinary Member; Fellow; Trainer; Examiner; Training Supervisors; COS; Research Report Reviewer

2.1.6 Functional Modules

The system shall be launched once all below functional modules of Phase 1 are developed. Below Information is provided to facilitate tenderers' understanding of each of the functional modules and the scope of the project. Details of which may be subject to change.

- a. Phase 1
 - Notice and Information
A Dashboard constituted of two main areas:
Notice: News or announcements made by Admins; Reminders; etc.
Information: Calendar, Status of fulfilling training requirement, etc.
 - Account Management
Members can change passwords, inquiry to the helpdesk, alter notification alerts for different types of messages, etc...
 - Personal Profile
Members can view personal profiles including personal information, training record, examination record, payment record, CME records in the system. Some of the fields such as residential addresses could be edited by members.
 - Accounting and Finance (Appendix 1)

- Assignment of rotation and trainer for BST and HST
In June and Dec, Department Secretary needs to assign department, hospital, and two trainers for trainees rotating to their hospitals in the coming 6-month through the system.

For Example:

Trainee A:	Department and Hospital	Trainer	
Jan – Mar	QMH, General Surgery	Trainer A, B	Assigned by QMH Secretary
Apr – June	PWH, General Surgery	Trainer C, D	Assigned by PWH Secretary

Trainee B:	Department and Hospital	Trainer	
Jan – Mar	QMH, General Surgery	Trainer A, B	Assigned by QMH Secretary
Apr – June			

College Admin to set the reminder to Department Secretary for assigning the Trainer, and Department and Hospital for trainees.

- Functional modules for Basic Surgical Training*
 - Half-yearly Assessment (Appendix 2); Competency Assessment (Appendix 3); Logbook (Appendix 4); CME Report (Appendix 5); Research Report (Appendix 6)
- Functional modules for Higher Surgical Training*
 - Half-yearly Assessment (Appendix 2); Workplace-Based Assessment (Appendix 7); Logbook (Appendix 8); Training Plan (Appendix 9); CME Report (Appendix 5); Research Report (Appendix 6);
- Functional modules for EEC*
 - Half-yearly Assessment (Appendix 2); CME Report (Appendix 5)

**All functional modules listed aligned with training requirements which might be changed from time to time, thus flexibility should be set to allow for future change. Submitted documents or completed online forms could be downloaded by the trainees in PDF format.*

Trainees may upload documents for other training requirements not stated above and should be able to view their requirement for each document's submission as well as keep track of their status in completing the requirement. Current submission requirement for each 6-month:

<i>BST</i>	<i>HST</i>	<i>EEC</i>
<ul style="list-style-type: none"> • 2 sets of Half-yearly Assessment Forms • Log Book Summary • Log Book Summary Report • CME Report • Competency Assessments 	<ul style="list-style-type: none"> • 2 sets of Half-yearly Assessment Forms • Log Book Summary • Log Book Summary Report • CME Report • Workplace-Based Assessments • Training Plan (if any) 	<ul style="list-style-type: none"> • 1 set of Half-yearly Assessment Form • CME Report

*Trainers could only view the submission of their trainees for current rotation while **COS and Training Supervisors** could view all submissions of their trainees (based on their principal hospitals) or submissions that are done in their hospitals by trainees rotating to their hospitals.*

b. Next Phase

- Registration for BST, HST, EEC, Ordinary Membership and Fellowship (Appendix 9-11)
- Examination Enrolment and Record (Appendix 12)
- CME Activity (Accreditation and Attendance) (Appendix 13)
- Annual Subscription (Appendix 14)

2.2 Service Requirements

2.2.1 Service Requirements

The Contractor shall provide the following services:

- a. Programming, testing, and debugging
- b. Adoption of Agile Methodology for E-Portfolio System Development Project
- c. Assist CSHK to apply for all necessary licenses (if applicable)
- d. Perform self-security risk assessment before major enhancements and changes associated with the system and related modules
- e. Software maintenance (e.g. bug fixing) and technical support
- f. Perform system, program, and database backup/restoration (Cloud)
- g. User Acceptance Test should be included and the test cases should be provided by the contractor before the official launch

2.2.2 Maintenance Services

- a. The Contractor shall provide free maintenance service for the system for the first year after written confirmation on completion of the system from the CSHK and chargeable maintenance service for at least ten years after the first year of free maintenance services.
- b. The maintenance services shall include:
 - i. Response to inquiries related to the use of the functions and programs
 - ii. Repair the system against any failure, including but not limited to bug fixing, within 3 working days or another period as agreed, upon the request by CSHK
 - iii. Other maintenance tasks are deemed necessary to the smooth operation of the system as proposed by CSHK
- c. The Contractor shall provide ad hoc services in maintenance activities (such as agreed enhancements, 'firefighting' etc.) on special occasions requested by CSHK. It is estimated that man-efforts equivalent to 4 man-days is included per year. The amount of payment chargeable shall be calculated based on the actual man-days spent and the rates specified in the Proposal concerning the delivery of the required services. The estimated cost of 4 man-days for such kind of ad hoc support task will be included for price comparison purposes.
- d. After the first year of free maintenance services, CSHK may acquire the maintenance services based on the Annual Fee quoted in the Proposal on an optional basis. CSHK will write to confirm the procurement of the maintenance services one month before the start of each maintenance year.

2.2.3 Security measures to protect the information

Security scan by a third party should be included to ensure no critical threat after the official launch of the system

2.3 Confidential Information

- a. Any confidential information concerning the services, contractual arrangements, dealings, and affairs of CSHK that may come to the Contractor's knowledge in the course of providing the services may not be disclosed without the consent of CSHK.
- b. The Contractor hereby agrees that it will use such confidential information solely for this project and that it will not, at any time before, during, or after the completion, expiry, or termination of this project use or allow being used the same for any other purposes (whether directly or indirectly) without CSHK's prior written consent.
- c. The Contractor shall ensure that its employees and sub-contractors are aware of and comply with the confidentiality and non-disclosure provisions contained in this Clause and the Contractor shall indemnify CSHK against any loss or damage which CSHK may sustain or incur as a result of any breach of confidence by any of such persons.

2.4 Delivery schedule with timeline:

Design, Development, Testing, Hosting up to Go-live	1> 01 st prototype – Within 15 days of Issue of Work Order. 2> 02 nd prototype – Within 21 days of Issue of Work Order. 3> 03 rd prototype – Within 30 days of Issue of Work Order. Complete development, Launching & Successful Implementation with fill features within 01 month of issuance of Work Order.
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3. TENDER EVALUATION CRITERIA AND PROCEDURE

The successful Tenderer should be capable of providing all of the services as specified in Section 2. The Tenderer should demonstrate their ability through the submission of tender.

3.1 Key Deliverables of Tender Submission

3.1.1 Fee Proposal

- a. Tenderers should provide the solid amount as well as the breakdown, unit rate, and the number of man-hours required as detailed as possible for each of the service areas where appropriate
- b. Tenderers should provide the amount of Annual maintenance service fee for each of the 10 years after the first year of free maintenance service.
- c. The fee proposal should include all the fees and costs involved in the project, including all service fees, design fees, and license fees if necessary
- d. Tenderers should indicate the receiving of commission from outside suppliers. Under such circumstances, CSHK may request the contractor to adjust the fees proportionally

3.1.2 Technical Proposal

- a. Detailed recommendations on the best solutions to fulfill the requirements in section 2
- b. A realistic timeline for the provision of services to fulfill the requirements in section 2
- c. Tenderers should provide the breakdown of the timeline as detailed as possible for each of the service areas where appropriate
- d. Company and project team profiles
 - I. Company's track record of similar work. Tenderers are required to demonstrate their experience by providing the information on the system(s) they have developed with details of the work carried out by the Tenderers
 - II. Size and structure of the project team dedicated to this corporate project with a description of the team members' responsibilities and degree of involvement
 - III. The calibre of the proposed team with biographies and relevant experience of key team members

Special remark: Tenderers should exclude all fee information from the technical proposal. Whenever any fee is included in the technical proposal, the submission will be disqualified.

3.2 Evaluation Criteria

Tenderers should note that the appointment of the Official Contractor for (Purpose of the project) and the awarding of the contract will not be solely dependent upon the fees quoted but also the proven ability of the Contractor in showcasing their solutions in delivering all the requirements as stated in the tender.

Tenders will be assessed using the following marking scheme:

Evaluation Criteria		Maximum Marks
1.	Fee	
	a. Project Development and Hosting Fee (if applicable)	50%
	b. Maintenance Fee for 10 years	50%
	Total:	100%

The weighted fee assessment score of the tender proposal shall be worked out in accordance with the following formula:

$$40 \times \frac{\text{Lowest total fee amount of all tenders}}{\text{Total fee amount of the subject tenders}}$$

Evaluation Criteria		Maximum Marks
2.	Technical	
	a. Detailed recommendations on the best solutions to fulfil the requirements in section 2	60%
	b. A realistic timeline for the provision of services to fulfil the requirements in section 2	20%
	c. Company and project team profiles	20%
	Total:	100%

The weighted technical assessment score of the tender proposal shall be determined in accordance with the following formula:

$$60 \times \frac{\text{Technical assessment mark of the subject tender}}{\text{Highest technical assessment mark of all tenders}}$$

Calculation of Combined Scores

The combined assessment score of the tender proposal shall be the sum of the weighted fee assessment score and weighted technical assessment score.

Evaluation Criteria	Weighting
1. Fee	40%
2. Technical	60%
Total:	100%

Special remark: Tenderers should note that a maximum of 5% may be deducted from the overall score for missing any of the required information specified in Section 3.

3.3 Evaluation Procedure

- a. Upon submission, the proposals will be examined to see if all the submission requirements are fulfilled. Only shortlisted Tenderers will be informed to proceed to the next stage of evaluation.
- b. Shortlisted Tenderers will be invited to the CSHK office to present their proposals to the Selection Panel. The Selection Panel consists of around 4 representatives from CSHK. The presentation will last for 25 minutes, followed by a 20 minutes Q&A session.
- c. The Selection Panel will evaluate the proposals with the marking scheme specified in section 3.2.

3.4 Schedule

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|---|--------------------------|
| a. Issuance of Tender: | 13 August 2021 |
| b. Tender Briefing: | Week of 23 August 2021 |
| c. Deadline of Tender Submission: | Noon, 25 September 2021 |
| d. Panel Meeting with Tenderers' Presentation : | Week of 11 October 2021 |
| e. Appointment Confirmation: | End of November 2021 |
| f. 1 st meeting with Appointed Contractor: | Week of 13 December 2021 |

4 TENDER SUBMISSION

An electronic copy of the tender should be sent to the Secretariat of CSHK at info@cshk.org (please put “CSHK – Tender for Official Contractor for E-Portfolio System” as the subject of your email). Tenderers should also submit two (2) sets of hard copies of the tender, which include two (2) copies of the fee proposal in a sealed envelope and two (2) copies of technical proposals in a separate sealed envelope. The hard copies of the tender should be delivered to the following address.

CSHK Secretariat

The College of Surgeons of Hong Kong

Room 601, Hong Kong Academy of Medicine Jockey Building, 99

Wong Chuk Hang Road, Aberdeen

Both electronic copies and hard copies of the tender should reach CSHK no later than 12:00 p.m., 25 September 2021. Late submission or failure to comply with the two-envelope approach will render the tender submission void and the proposals will not be considered.

5 NOTES TO TENDERER

- a. CSHK reserves the right to appoint the Tenderer for taking up all or part of the services as specified in this tender without unit price alteration to the items or sections accepted. The Tenderer hereby acknowledges that there will not be any loss of profit claim as a result of the reduction in the scope of works.
- b. Tenderers should note that CSHK would not be responsible for the reimbursement of any cost incurred for the preparation of the proposals.
- c. CSHK may reject a tender that is unreasonably low in terms of price as it may affect the Tenderer's capacity to carry out and complete the services required. Likewise, CSHK may also reject a tender that is unreasonably high in terms of price as it may reflect the Tenderer's misinterpretation of the required work scope.
- d. CSHK reserve the right to negotiate with any or all Tenderer(s) on the terms of the tender.
- e. Tenderers shall comply with the General Terms and Conditions of Contract set. The tender price shall deem to be included all costs incurred.
- f. The Tenderer shall strictly comply with the following anti-collusion clause:
 - i. The Tenderer shall not communicate to any person other than CSHK the amount of the tender price or any part thereof until the Tenderer is notified by CSHK of the outcome of the tender exercise.
 - ii. Further to sub-clause (1), the Tenderer shall not fix the amount of the tender price or any part thereof by arrangement with any other person, make any arrangement with any person about whether or not he or that other person will or will not submit a tender or otherwise collude with any person in any manner whatsoever in the tendering process.
 - iii. Any breach of or non-compliance with this sub-clause by the Tenderer shall, without affecting the Tenderer's liability for such breach or non-compliance, invalidate his tender.

The Tenderer shall submit with his tender a duly signed and witnessed letter in the form set out in **Appendix 16**. The Tenderer shall indemnify CSHK against all losses, damages, costs, or expenses arising out of or in relation to any breach of or non-compliance with this clause by the Tenderer, including but not limited to additional costs due to price escalation, costs, and expenses of re-tendering and other costs incurred.

6 CONFIDENTIALITY STATEMENT

Tenderers shall at all times treat the information stated in this tender as confidential and shall not disclose, copy, distribute or pass the information to any other person at any time or permit or suffer any of these things to happen. Tenderers shall not use the information for any purpose other than for the purpose of submitting or deciding whether to submit a tender.

7 ENQUIRIES

Requests for further information or clarification of requirements may be directed to Mr Shawn YIP at 2871 8757 or email to shawnyip@cshk.org.hk

~ The End ~