**SECTION 7**

**ANNEXES TO TENDER**

 **ANNEX 1**

**Page of**

**COMPANY OVERVIEW**

1. Summary of the Tenderer: A summary of your organization, including its size, years in operation, notable past and present clients, and the range of services offered. If applicable, include details of subcontracting or partnerships, including the names of subcontractors or partners and their respective roles and responsibilities.

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**ANNEX 1**

**Page of**

**COMPANY OVERVIEW**

1. Implementation Team: List the names of Project Manager, System Analyst, and other key team members (including their mode of service and their roles), as well as their relevant experience.

Note: If any staff replacements occur post-kick-off, the new staff must possess equivalent or better qualifications and experience compared to those being replaced. Prior agreement by the CFSC or CFSC Representative is required.

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**A****NNEX 2**

**Page of**

**SUMMARIES OF RELEVANT ASSIGNMENTS CONDUCTED**

* 1. Relevant / similar assignments completed, particularly for non–governmental / government–funded organisations, and / or social welfare projects in Hong Kong, including Name of User / organization, contact person information, the solution / software / modules supplied, number of users of each module, scope of services provided, date and time frame of implementation, total development and customization effort required.
	2. Experience in handling data migration from legacy accounting systems, including Name of User / organization, contact person information, the legacy system name and version, as well as the date and time frame of the migration.

Note: CFSC may contact such organization to solicit the necessary reference information for proposal evaluation.

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**ANNEX 3**

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**SERVICES TO BE PROVIDED BY CFSC**

The assistance and services needed from the Christian Family Service Centre (CFSC) to facilitate the preparation of work and deliverables.

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**ANNEX 4**

**SYSTEM SPECIFICATIONS AND REQUIREMENTS COMPLIANCE TABLE**

The template is enclosed and can be found in attachments to Tender

**ANNEX 5**

**Page of**

**IMPLEMENTATION APPROACH**

* + - 1. A brief description of the proposed solution (viz. solution overview, system requirement, architecture, solutions of interface and reporting, backup and recovery strategy, disaster recovery plan, resilience, contingency, scalability, data conversion and migration approach, security), implementation and integration approach, methodology to be used, and the plans for software quality assurance (e.g. procedure for various kinds of acceptance and testing, version / release control, configuration management, acceptance procedure of deliverables, standards on project management, etc.), infrastructure and network diagram.
			2. The following documents should be provided for technical review:
				1. Data conversion plan and methodology
				2. Data migration plan and methodology
				3. API document/methodology (integrate with other systems)
				4. API document/methodology (retrieve data from new system)
				5. Backup and recovery plan
				6. Disaster recovery plan
				7. Security document (user management, data encryption, network protocol, etc.)
				8. Cloud platform specification
				9. Network diagram and architecture

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**ANNEX 6**

**Page of**

**SYSETM SOFTWARE AND HAREWARE**

* + - 1. A list of proposed mandatory and optional system software and hardware for this tender project, including product names, descriptions, versions, relevant specifications, development tools, middleware, integration tools/adaptors, other software considered necessary, and the licensing package offered for all software, including the number and type of licenses proposed (e.g. named, concurrent or server).

2. The following documents should be provided for technical review:

* + - * 1. Automation functions and specifications
				2. Hardware specifications

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**ANNEX 7**

**Page of**

**SYSETM PERFORMANCE METRICS**

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| **Performance Metric** *(add any other metrics as needed)* | **Description / Target** |
| 1 | System Uptime Percentage (at least 95% of up time a year) |  |
| 2 | Session Timeout Duration (duration should be configurable) |  |
| 3 | Audit Log Retention Period - Maximum storage duration for audit logs and event messages, in days (at least 30 days) |  |
| 4 | Load Handling Capacity (Maximum number of users the system can support simultaneously) |  |
| 5 | Scalability (Ability to handle increased loads or users) |  |
| 6 | Transaction Throughput - Transactions per second, e.g. create, update, delete, saving an order (at least within 2 second per transaction)  |  |
| 7 | Latency (Time taken for data transfer / response, in milliseconds) |  |
| 8 | Average response time for user interactions during peak loads |  |
| 9 | Data retrieval time(Time taken for generating reports and running queries, e.g. AR Aging analysis, financial reports) |  |
| 10 | Page load time (Time taken for web interfaces to load) |  |
| 11 | Event Processing Time(Time taken to process events such as user actions, system notifications, automated tasks) |  |
| 12 | Compliance and Security Metrics (User access control measures, time taken to detect and mitigate threats, compliance with regulations, e.g. GDPR,) |  |
| 13 | Time required for full system backup |  |

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**ANNEX 8**

**Page of**

**SCHEDULE OF TRAINING**

A list of training sessions, both free and chargeable, including session content, duration, location, format (in-person, online or a hybrid model), target trainee (system administrators, finance team, frontline service units), estimate number of trainees per class, frequency of classes to be organised, and available resources and facilities.

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ANNEX 9

**Page of**

**IMPLEMENTATION SCHEDULE**

Proposed implementation plan and timeline with major milestones and deliverables. The major milestones for the project include, but are not limited to, the following tasks:

|  |  |  |
| --- | --- | --- |
| **Major Task***add any other tasks as needed* | **Deliverables***add other documents as appropriate* | **Complete by End of** **Month** |
| Project Initiation | Project initiation document |   |
| User Requirements Study for Customization and Configuration  |  |  |
| System Analysis, Workflow Design and Prototyping | Blueprint, data diagram, data schema, data mapping documentation |  |
| System Development and Unit Test  |  |  |
| System and Integration Test – Human Resources Management System and Program and Activities System |  |  |
| Pre-UAT Data Conversion (The tenderer is responsible for data migration and the import process) | Data conversion plan |  |
| User Training | User Manuals |  |
| User Acceptance Test (UAT) | Specification of UAT |  |
| Backup / Recovery Procedures and Drill Test |  |  |
| Pre-Production Data Conversion (if necessary and applicable)  |  |  |
| Security Risk Assessment and Audit (SRAA), Privacy Impact Assessment (PIA) for System Deployment | N.A.(4 weeks /1 month to deliver reports) |
| System enhancements based on the audited results and recommendations of the SRAA and PIA. |  |  |
| System Installation and Production Rollout |  |  |
| System Documentation  |  |  |
| System Nursing (2 months after system rollout), Handover plan |  |  |
| **Total number of months required for completion of the project** |  |

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ANNEX 9 (continue)

**Page of**

**IMPLEMENTATION SCHEDULE**

Proposed implementation plan and timeline with major milestones and deliverables. The major milestones for the project include, but are not limited to, the following tasks:

Please refer to Annex 4E – System Integration Data File (系統整合資料檔) for more information.

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| **Major Task***add any other tasks as needed* | **Deliverables***add other documents as appropriate* | **Complete by End of** **Month** |
| **Integration / Interface with other systems (starting from Production rollout)** |  |
| 1 | ECC (District Elderly Community Centre System) |  |  |
| 2 | 中醫方程式, HKMA CMS 5.0 (Clinical systems) |  |  |
| 3 | Eat 365 (replacement system of PointSoft) / Softcube (point-of-sale systems) |  |  |
| 4 | FOX Payroll Calculation學員獎勵金 |  |  |
| 5 | MRB 智顧家 |  |  |
| 6 | CIS / Carys (Client Information system) |  |  |
| 7 | System Integration and User Acceptance Test / Risk Assessment |  |  |
| 8 | System Documentation |  |  |
| 9 | System Nursing and Handover plan  |  |  |
| **Total number of months required for integration with other systems** |  |

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**ANNEX 10**

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**STANDARD REPORTS**

Please provide detailed descriptions of all standard reports from the proposed system. Explain how customized reports can be created and outline any additional costs associated with both standard and customized reporting components. Disclose these costs separately in Annex 11 – Summary of Fees.

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**ANNEX 11**

**Page**  **of**

**SUMMARY OF FEES (Perpetual / SaaS Solution)\***

* 1. Enter ‘FOC’ (i.e. Free of Charge) where applicable.
	2. Unless otherwise specified elsewhere in in Contract, all periodic payments due shall be paid in arrears.
	3. User separate sheet or insert rows if more space is needed.
	4. Supplementary quotations and any relevant information should be provided along with this Annex.

\* Delete as appropriate. If available, please provide prices for both perpetual solution and Annual Subscription License (SaaS) Solution with a 5-year Total Cost of Ownership for comparison.

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| **System Software & Maintenance Service** 1. All purchase prices for system software shall include at least 12 months free–of–charge maintenance service after the date of acceptance. Tenderer shall state the length of free–of–charge maintenance service if it is more than 12 months.
2. The free maintenance period should be extended by the number of man–days required to fix any errors or bugs identified after acceptance testing.
3. After the free warranty period, we may choose to enroll in a maintenance service plan. There should be no penalty if we do not sign up for any maintenance plan, change to a different plan, or switch back to the original plan.
 |
| Item no. | **Mandatory Costs**(e.g., hardware, perpetual license, customization man–days) | One–off fee (HK$) |
| Quantity | Unit Price | Total Price | Remarks |
| 1 |   |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
|  |
| Item no. | **Mandatory Costs**(Annual license, excluding warranty) | [[1]](#footnote-1)Annual subscription / user license fee, if any (HK$)(Start from date of ) |
| Quantity | Unit Price | 1st Year | 2nd Year | 3rd Year | 4th Year | 5th Year |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |

**ANNEX 11**

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**SUMMARY OF FEES (Perpetual / SaaS Solution)\***

1. Enter ‘FOC’ (i.e. Free of Charge) where applicable.
2. Unless otherwise specified elsewhere in in Contract, all periodic payments due shall be paid in arrears.
3. User separate sheet or insert rows if more space is needed.
4. Supplementary quotations and any relevant information should be provided along with this Annex.

\* Delete as appropriate. If available, please provide prices for both perpetual solution and Annual Subscription License (SaaS) Solution with a 5-year Total Cost of Ownership for comparison.

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|  **Optional System software or function module**  |
| Item no. | Product | One–off fee | Annual fee[[2]](#footnote-2), if any (Start from ) |
| 1st Year | 2nd Year | 3rd Year | 4th Year | 5th Year |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |

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|  **Service Charges (Implementation, Configuration, etc.) and** **Number and types of licenses needed for testing**  |
| Item no. | Item Description | Unit Price | Quantity  | One–offfee | Annual fee, if any(Start from ) |
| 1st Year | 2nd Year | 3rd Year | 4th Year | 5th Year |
|  1 | License for testing |  |  |  |  N.A. |  N.A. |  N.A. |  N.A. |  N.A. |

**ANNEX 11**

**Page of**

**SUMMARY OF FEES (Perpetual / SaaS Solution)\***

1. Enter ‘FOC’ (i.e. Free of Charge) where applicable.

1. Unless otherwise specified elsewhere in in Contract, all periodic payments due shall be paid in arrears.
2. User separate sheet or insert rows if more space is needed.
3. Supplementary quotations and any relevant information should be provided along with this Annex.

\* Delete as appropriate. If available, please provide prices for both perpetual solution and Annual Subscription License (SaaS) Solution with a 5-year Total Cost of Ownership for comparison.

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|  **Training**  1. The training should be conducted regularly or when requested by the CFSC. 2. Free sessions, charging rate or bulk charging rate for the training must be clearly specified. 3. Target trainees include System administrators, Finance Team and frontline service units.  |
|  Content of Sessions | Duration (Days / Hours) | Target trainee | Frequency of classes to be organized | Training resources and facilities  | Fee per seat |
|   |  |  |  |  |  |
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| Post Warranty Maintenance fee per year (HK$) |
| Item no. | **Warranty Maintenance Costs**(hardware, software) | Unit Price | 1st year[[3]](#footnote-3) | 2nd Year | 3rd Year | 4th Year | 5th Year |
| 1 |  |  | Free Warranty Period |   |  |  |  |
| 2 |  |  | Free Warranty Period |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |

**ANNEX 11**

**Page of**

**SUMMARY OF FEES (Perpetual / SaaS Solution)\***

1. Enter ‘FOC’ (i.e. Free of Charge) where applicable.
2. Unless otherwise specified elsewhere in in Contract, all periodic payments due shall be paid in arrears.
3. User separate sheet or insert rows if more space is needed.
4. Supplementary quotations and any relevant information should be provided along with this Annex.

\* Delete as appropriate. If available, please provide prices for both perpetual solution and Annual Subscription License (SaaS) Solution with a 5-year Total Cost of Ownership for comparison.

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| **Summary of** **Total Mandatory Cost** | **One–off**  | **Annual fee[[4]](#footnote-4)** (Start from ) |
| 1st Year | 2nd Year | 3rd Year | 4th Year | 5th Year |
| Mandatory System Software  |  |  |  |  |  |  |
| Mandatory Service |  |  |  |  |  |  |
| Mandatory Training  |  |  |  |  |  |  |
| Total Mandatory Cost |  |  |  |  |  |  |
| Remarks (any relevant information) |  |  |  |  |  |  |

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**ANNEX 11**

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**SUMMARY OF FEES (Perpetual / SaaS Solution)\***

**Payment Schedule**

Once the Tender proposal is accepted, the contract sum will be paid according to the following schedule:

|  |  |
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| PROJECT MILESTONE / STAGE | PERCENTAGE OF CONTRACT |
| **Project Initialization -** Project Initiation Document Sign–off | 5% |
| **System Analysis and Design Completion:** Finalization of User requirements and approval of functional specifications.  | 15% |
| **License for testing**Only the necessary types and quantities for testing will be purchased after the blueprint is confirmed. | Per Annex 11 – Summary of Fees |
| **Functional Test Sign–off:** * Confirmation that the system meets the specified functional requirements as defined in the Specification (Annex 4)
* Procured items installed and certified in good condition
* All agreed function modules are available and ready for unit test
 | 15%(5% each) |
| **System Integration and User Acceptance Test Sign–off:** * No discrepancies between the actual test output and the expected output in the System Integration Test Plan and The Specification
* Verification of the successful completion of UAT and any necessary system enhancements based on the results and recommendations of SRAA and PIA
* Training materials accepted by CFSC; training session conducted as planned
 | 30%(10% each) |
| **System Live–Run:** * Assurance that all system processes, features, and modules are successfully executed in a live environment.
* System performance at a pre-defined acceptable level
 | 15% |
| **End of Nursing Period: (2 months after system rollout)*** Completion of financial month-end closing, resolution of post-user acceptance testing errors and bugs, satisfactory addressing of critical issues, and ten working days without reports of bugs, errors or problems. Formal sign-off is required.
 | 20% |

**\*Please delete where appropriate**

I/We confirm that our tender proposal \**complies / does not comply* fully with the payment schedule described above. Please outline the aspects that do not fully comply with the payment schedule below:

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**ANNEX 12**

**ANTI–COLLUSION DECLARATION**

TO: Christian Family Service Centre (hereinafter referred to as “CFSC”)

Tender Subject：Provision of Enterprise Resource Planning System

Tender Reference：FD-20250901

1. We warrant that in relation to the Technical and Fee Proposals for this Tender:
2. We have not have not communicated and will not communicate to any person other than CFSC, the amount of the proposed prices in the Fee Proposal or any part thereof until we have been notified by the Employer of the outcome of the bidding exercise, except when it was necessary to confidentially disclose the approximate amount of the Tender to obtain the required insurance premium quotations for its preparation;
3. We have not fixed and will not fix the amount of the proposed prices in the Fee Proposal or any part thereof by arrangement with any person;
4. We have not made and will not make any agreement or arrangement with any person to refrain from submitting Technical and Fee Proposals or to influence the amount of any Tender that will be submitted;
5. We have not otherwise colluded and will not otherwise collude with any person in any manner whatsoever in the bidding process.
6. We acknowledge that, in the event the anti–collusion declaration is found to be incorrect, the employer reserves the right to take appropriate actions against the tenderer. Such actions may include:
7. disqualifying the tenderer from the current bidding process;
8. terminating any existing contracts;
9. pursuing any legal remedies available under applicable laws, including recovering all amounts paid.
10. report the incident to relevant authorities, and
11. exclude the tenderer from participating in future procurement opportunities.

Remarks:

*If the Tenderer consists of two or more persons or companies in a partnership, joint venture, or other arrangement, this section should include their respective names and addresses, and all parties must sign. Each signatory must be authorized to sign contracts on behalf of their respective entity.*

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**ANNEX 13**

**DECLARATION ON CONVICTIONS TO**

**HONG KONG LAW OR ORDINANCE**

TO: Christian Family Service Centre (hereinafter referred to as “CFSC”)

Tender Subject：Provision of Enterprise Resource Planning System

Tender Reference：FD-20250901

During the last 12 months period, this company has \*no/ the following/ conviction(s) to the following Law or Ordinance.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Item | Law or Ordinance | Any Conviction (Yes / No) | No. of Conviction | Details of Conviction |
| 1  | The Law of the People's Republic of China on Safeguarding National Security in the Hong Kong Special Administrative Region |  |  |  |
| 2 | Employment Ordinance (Cap.57) and Employees Compensation Ordinance (Cap.282) |  |  |  |
| 3 | Immigration Ordinance (Cap.115)  |  |  |  |

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1. Specify the date when charges begin. [↑](#footnote-ref-1)
2. Specify the date when charges begin. [↑](#footnote-ref-2)
3. The first year of the post-warranty maintenance period starts from the date of installation, which is the date the ERP system moves from the testing environment to the production environment upon User Acceptance Test signoff. [↑](#footnote-ref-3)
4. Specify the date when charges begin in each relevant section [↑](#footnote-ref-4)