

REQUEST FOR QUOTATION

TRAINING SERVICES (PART II)

FOR

THE 2009/10 IT TRAINING PROGRAMME FOR SMEs

Issued

By

Hong Kong Productivity Council

31 Mar 2010

Ref: MEIIA-RFQ-100331

## PURPOSE

On behalf of the Manufacturing Enterprise Integration and Innovation Association (MEIIA), the Hong Kong Productivity Council (HKPC) issues Request For Quotation (RFQ) to invite interested parties to provide training services for “The 2009/10 IT Training Programme for SMEs” which is a government project sponsored by the Office of the Government Chief Information Officer (OGCIO).

## BACKGROUND

2. “The 2009/10 IT Training Programme for SMEs” is a new initiative launched by the OGCIO with the objectives to enhance SMEs’ IT awareness and capabilities and help them to embrace IT as a strategy tool for business, and eventually, to improve SMEs’ operational efficiency, competitiveness and sustainable business development.

3. MEIIA is one of the organizers to execute this Programme. To ensure the Programme to be rolled out successfully, HKPC is engaged as the Implementation Agent to execute all the tasks and activities. The aim of this RFQ is to identify a number of training service provider(s) to help provide training materials and conduct training courses.

## PROGRAMME DETAILS

### Objectives

4. The objectives of this Programme include:
- Enhance SME’s IT awareness for both management and operational staff;
  - Educate SMEs how to use IT as a strategic tool to enhance competitiveness;
  - Promote Open Source Software as a low-cost IT solution for SMEs; and
  - Create success stories through the mentorship program.

### Training Modules

5. The Training Programme consists of the following modules:

	Module	Description
I.	Technical Series	Classroom type training to introduce free or low-cost IT products and solutions to SMEs with focus in Open Source Software (OSS).

	Module	Description
II.	Management Series	Mentorship Program with one-on-one advisory sessions to assist individual SME; plus Classroom type training in specific management subjects that are critical to implementing successful change processes as well as successful teamwork. This series of training teaches the middle managers and staff on causal analysis, decision making, planning, and situational audit.
III.	Commercial Series	Classroom type training to introduce practical and cost effective commercial software (such as ERP, CRM, POS) to SMEs.

### Management Structure

6. A Steering Committee chaired by the chairman of MEIIA has been formed to oversee the whole Programme to ensure quality training courses being organized and delivered to SMEs. The Committee members include the executive committee members of MEIIA and representatives from collaboration parties, including Federation of Hong Kong Industries (FHKI) and SME Global Alliance (SMEGA). As the Implementation Agent, HKPC has assigned a Project Manager to oversee the execution of this Programme.

### Programme Schedule

7. The Programme will be executed according to the following milestones.

	Milestone	Start Date	End Date
a.	Course Planning & Development	Apr 2009	Apr 2009
b.	Training Program Promotion	Apr 2009	Jun 2010
c.	Training Course Rollout (Part 2)	Apr 2010	Jun 2010

**SCOPE OF WORK**

8. The Training Service Provider shall be responsible for the following tasks:
- Engage a Trainer to conduct a series of the training classes selected from the Course List specified below;
  - Engage a Training Assistant at the same time to help prepare training materials and facilitate training classes;
  - Provide training materials to HKPC for pre-approval at least 4 weeks before the training class commencement; and
  - Provide printed copy of training material for class attendants.

Delivery Location

The training courses shall be delivered in HKPC Building or any other places agreed by HKPC and the Training Service Provider.

Course List:

The Training Service Provider shall select training courses from the following list:

Note – The total number of class for each course must be the same as the frequency indicated in the following table.

I. Technical Series

1.	Course name:	Open Source Software (OSS) Fundamental for SMEs
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	3 classes
	Size:	25 – 30 participants per class
	Description:	The participants will learn about: <ul style="list-style-type: none"> <li>• OSS characteristics and components</li> <li>• Popular OSS products, trend and market information</li> <li>• Benefits (Cost Saving) of using OSS products and solutions</li> <li>• Methodology of OSS solution deployment in SME</li> </ul>
	Target audience:	Non-IT users; general SMEs
	Prerequisite:	Nil
	Other conditions:	Nil

2.	Course name:	Open Office Workshop
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	3 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• Use Open Office as another choice for office automation</li> <li>• Install the software and set configuration</li> <li>• Handle the difference with MS Office</li> <li>• Roll-out the solution within an enterprise</li> </ul>
	Target audience:	Office users; general SMEs
	Prerequisite:	Basic understanding of MS Office
	Other conditions:	Nil

3.	Course name:	Online Retailing, Wholesaling and Trading System Workshop
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	5 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• Select a suitable online web system</li> <li>• Operate varies web systems</li> <li>• Create legal eDM</li> <li>• Handle SEO formats and tips</li> <li>• Prepare and implement CRM through digital media</li> </ul>
	Target audience:	Marketing; general SMEs
	Prerequisite:	Basic understanding of varies web systems and effective Internet Marketing Strategy
	Other conditions:	Nil

4.	Course name:	Powerful Open Source Software (OSS) Tools for SMEs
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	3 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to streamline their business operations or enhance their competitiveness through several powerful OSS tools:

		<ul style="list-style-type: none"> <li>• Make use of social network application (Facebook and their tool Zembly) to seek target customer on the web</li> <li>• Make use of modern content management system (Drupal) to maintain a flexible and dynamic website</li> <li>• Make use of e-shopping software (ZenCart) to maintain a platform for online selling</li> <li>• Make use of business intelligent and reporting tool (Jaspersoft) to retrieve and analyze business data promptly</li> </ul>
	Target audience:	Business owner; Operation manager
	Prerequisite:	Nil
	Other conditions:	Nil

5.	Course name:	MySQL Database Management Workshop
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	3 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to:</p> <ul style="list-style-type: none"> <li>• Use MySQL as another choice for database management</li> <li>• Install the database and set configuration</li> <li>• Handle the difference with other database platform</li> <li>• Develop software solution with MySQL</li> </ul>
	Target audience:	MIS; software developer
	Prerequisite:	Basic concept of database management
	Other conditions:	Nil

6.	Course name:	Information Security Protection in a SME environment
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	3 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to:</p> <ul style="list-style-type: none"> <li>• Identify Information Security Threats within an organization</li> <li>• Establish an Information Security Protection Strategy</li> <li>• Establish the Information Security Policy and Procedures</li> <li>• Identify and Install suitable Information Security software</li> <li>• Configure the hardware and software</li> </ul>

	Target audience:	MIS, System Administrator
	Prerequisite:	Nil
	Other conditions:	Nil

7.	Course name:	Unix/Linux Fundamentals
	Type:	Classroom training
	Duration:	24 hours (eight 3-hour sessions)
	Frequency:	1 class
	Size:	10 – 15 participants per class
	Description:	The participants will learn about: <ul style="list-style-type: none"> <li>• Unix and Linux components</li> <li>• File system and File processing</li> <li>• Networking control</li> <li>• Shell programming</li> <li>• System backup</li> <li>• Desktop environment</li> </ul>
	Target audience:	MIS, System Administrator
	Prerequisite:	IT background
	Other conditions:	Nil

## II. Management Series

1.	Course name:	Practical Intellectual Property Management of IT
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 classes
	Size:	15 – 30 participants per class
	Description:	The participants will learn about: <ul style="list-style-type: none"> <li>• Provide uniform policy and guidance when coping any possible threats in damaging the Enterprise itself and its operations (copyright issues)</li> <li>• Ensuring sensitive information are protected from fraud, misuse, disclosure or in any terms sabotage the Enterprise itself (trade secrets issues)</li> <li>• Access security threat on regular basis and well planned crisis management</li> <li>• (extra) Software Development and Domain name registration and tips of protection</li> </ul>

	Target audience:	Management, MIS, HR
	Prerequisite:	Basic computer literacy
	Other conditions:	Nil

2.	Course name:	Operation Management Skills For SMEs
	Type:	Classroom training
	Duration:	16 hours (four 4-hour sessions)
	Frequency:	2 classes
	Size:	25 – 30 participants per class
	Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• Causal Analysis (Problem Solving)</li> <li>• Decision Making</li> <li>• Planning</li> <li>• Situational Audit</li> </ul>
	Target audience:	General SMEs
	Prerequisite:	Have at least 5 years working experience
	Other conditions:	Nil

3.	Course name:	Collaborative Office Automation to enhance multi-departmental cooperation productivity
	Type:	Classroom training
	Duration:	3 hours (one 3-hour session)
	Frequency:	2 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• A multi-location office productivity suite</li> <li>• Open Source solutions</li> <li>• Microsoft solutions</li> <li>• Other vendor solutions</li> <li>• Pros &amp; Cons of various solutions</li> </ul>
	Target Audience:	Business owner; Admin manager; Non-IT users
	Prerequisite:	Basic understanding of MS Office
	Other conditions:	Cross-border operations preferred

4.	Course name:	Disaster Recovery & Business Continuity Management – be prepared for the unthinkable
	Type:	Classroom training

Duration:	6 hours (two 3-hour sessions)
Frequency:	2 classes
Size:	15 – 20 participants per class
Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• Business continuity concerns</li> <li>• New contingency program paradigm</li> <li>• Developing a contingency program with impact analysis</li> <li>• Guidelines for contingency planning for multiple locations</li> <li>• Strategies for loss of computer operations</li> <li>• Disaster recovery principles &amp; practices</li> </ul>
Target Audience:	Business owner; Admin manager; MIS
Prerequisite:	Nil
Other conditions:	Nil

5.	Course name:	Green IT – environmental sustainable computing
	Type:	Classroom training
	Duration:	3 hours (one 3-hour session)
	Frequency:	2 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• Green Human behaviours</li> <li>• Green Structures for environmental design &amp; construction</li> <li>• Harmonious society calls for Green Relations among people</li> <li>• Green use – reduce energy consumption and utilize in environment-friendly manners</li> <li>• Green disposal – refurbish old computers and recycle unwanted equipment</li> <li>• Green design – for energy-efficiency and environmental sustainability</li> <li>• Green manufacturing – with least impact on the environment</li> </ul>
	Target Audience:	Business owner; Admin manager; Non-IT users
	Prerequisite:	Nil
	Other conditions:	Nil

6.	Course name:	Information Resources and Budgeting for IT
	Type:	Classroom training

Duration:	6 hours (two 3-hour sessions)
Frequency:	2 classes
Size:	15 – 20 participants per class
Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• Setting the IT direction for the enterprise</li> <li>• Merging the business and IT strategy</li> <li>• Issues of Budgeting for IT: budgeting for the operations, capital / investment (new IT capability, including HW, SW, infrastructure, etc.) budget</li> <li>• Managing the “IT budget” &amp; framework for approval of new IT projects</li> </ul>
Target Audience:	Business owner; Financial Controller, Accountant
Prerequisite:	Nil
Other conditions:	Nil

7.	Course name:	Selecting a software solution – build or buy
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to: <ul style="list-style-type: none"> <li>• Process and risks of buying commercial off-the-shelf software</li> <li>• How about tailoring a software package?</li> <li>• Quality Assurance for building tailor-made software</li> <li>• Outsourcing Project Management</li> <li>• Risk Management</li> <li>• 36 Key Success Factors</li> </ul>
	Target Audience:	Business owner; Financial Controller, MIS
	Prerequisite:	Basic concept of software development
	Other conditions:	Nil

8.	Course name:	Information Management 5S program for SME
	Type:	Classroom training
	Duration:	8 hours (two 4-hour sessions)
	Frequency:	4 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to:

		<ul style="list-style-type: none"> <li>• Increase productivity at zero cost</li> <li>• Mastering MS-Outlook on email, contact, calendar, tasks, notes, and journal with practical case study</li> <li>• Benefits of IM 5S method</li> <li>• Effective ways to implement IM 5S within an enterprise</li> </ul>
	Target Audience:	Business owner; Admin manager; Marketing manager; Non-IT executives
	Prerequisite:	Users of MS-Outlook 2003/2007
	Other conditions:	Nil

9.	Course name:	Intellectual Capital Management for SMEs
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	3 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to:</p> <ul style="list-style-type: none"> <li>• Tailor-made the Intellectual Capital Statement for an enterprise</li> <li>• To position SMEs for more advantageous financing with the use of Intellectual Capital Statement</li> <li>• Make use of intellectual capital to create a unique corporate branding and enhance corporate reputation</li> </ul>
	Target Audience:	General SMEs
	Prerequisite:	Nil
	Other conditions:	Nil

### III. Commercial Series

1.	Course name:	Microsoft Online Services Workshop for SME
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to enjoy enterprise grade communications tools by easy subscription:</p> <ul style="list-style-type: none"> <li>• Email &amp; Calendaring (Exchange online) <ul style="list-style-type: none"> <li>- How to unify Staff email accounts across locations and seeing each other schedule on one platform</li> </ul> </li> </ul>

		<ul style="list-style-type: none"> <li>- Antis-Spam / Antivirus features solving your daily junk mail overflow headache</li> <li>- Migration from ISP Mail – learn how</li> <li>• Live Meeting Online <ul style="list-style-type: none"> <li>- How to save travel cost by putting meeting/ training online</li> <li>- Experience Live Meeting in action</li> </ul> </li> <li>• IM and Portal</li> </ul>
	Target audience:	MIS; IT Manager; Office Operation Manager
	Prerequisite:	Basic concept of email accounts management
	Other conditions:	Nil

2.	Course name:	Yahoo & Google Search Engine Marketing (SEM) and Optimization
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to increase brand awareness, web site exposure and traffic with the drive of online sales opportunities by:</p> <ul style="list-style-type: none"> <li>• Understanding the distinctive benefits of different ad format: search engine marketing, ad banner Yahoo! fixed position ad, and Google placement targeting; the mechanism of Yahoo! and Google’s search engine.</li> <li>• Manipulating Search Engine Marketing (SEM) strategy on the powerful search platform: Yahoo &amp; Google. Skills on account setup, keyword selection &amp; bidding, ad text copywriting, manage ad group campaign and increase quality score by optimizing the website.</li> <li>• Understanding fatal reasons that drive visitors away; raise the web site ranking in the natural search results by Search Engine Optimization (SEO).</li> <li>• Case studies</li> </ul>
	Target audience:	Business Development and Marketing Directors or Managers, who are interested in increase sales leads, raise brand awareness and promote products/services through online channel.

	Prerequisite:	Nil
	Other conditions:	Nil

3.	Course name:	Web 2.0 Document and Workflow Management Workshop
	Type:	Classroom training
	Duration:	3 hours (one 3-hour session)
	Frequency:	2 classes
	Size:	25 – 30 participants per class
	Description:	The participants will learn: <ul style="list-style-type: none"> <li>• Document Scanning and Imaging Solution</li> <li>• Web 2.0 Document Management Technology</li> <li>• Latest PDF, eForm and e-Signature Technology</li> <li>• Web 2.0 eForm and Workflow Technology</li> </ul>
	Target audience:	General SMEs
	Prerequisite:	Basic Computer Knowledge
	Other conditions:	Nil

4.	Course name:	Finance Office – Smarter Cost Accounting with ERP
	Type:	Classroom training
	Duration:	14 hours (two 7-hour sessions)
	Frequency:	3 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn about: <ul style="list-style-type: none"> <li>• Mainland accounting principle for business development in Mainland China</li> <li>• How new generation business leaders master the three core financial reports to get effective control of the enterprise</li> <li>• How to strengthen the sales, procurement and production cost consciousness, to avoid violating the national accounting laws</li> <li>• How to use ERP to enhance the cost management for core business so as to improve capital utilization efficiency</li> <li>• How to master core financial management and control methodology to create Blue Ocean competitive advantage</li> </ul>
	Target audience:	CEO, CFO, Financial Controller, Finance Manager, Accountant
	Prerequisite:	Basic concept of financial accounting management
	Other conditions:	Nil

5.	Course name:	Commercial CRM Workshop for SMEs
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to use a commercial CRM system to:</p> <ul style="list-style-type: none"> <li>a) Maximize sales effectiveness in real time by accelerating the quote-to-cash process, aligning sales channels, increasing pipeline and win rates, and raising average transaction values</li> <li>b) Simplify the complex and often frustrating process of tracking thousands of products across multiple catalogs and systems</li> <li>c) Empower B2B and B2C organizations across industries to achieve excellence in marketing</li> <li>d) Deliver quicker, better, and more-efficient customer service</li> <li>e) Allow your customers to do business with you anytime, anywhere</li> <li>f) Allow brand owners to achieve their channel business objectives</li> </ul> <p>A commercial CRM package will be used as an example to demonstrate the processes.</p>
	Target audience:	Marketing; general SMEs
	Prerequisite:	Nil
	Other conditions:	Nil

6.	Course name:	POS Workshop for Retailing Operation
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to use a commercial POS system for:</p> <ul style="list-style-type: none"> <li>a) Product Catalogue Setup</li> <li>b) Pricing and Discount Policies</li> <li>c) Loyalty Program Management</li> <li>d) Inventory Optimization and Distribution Planning</li> </ul>

		e) Shop Order/Return/Exchange f) Payment by Cash, Credit Cards, EPS, etc g) Sales and Inventory Analysis A commercial POS package will be used as an example to demonstrate the processes.
	Target audience:	General SME retailers
	Prerequisite:	Nil
	Other conditions:	Nil

## REQUEST FOR QUOTATION

9. Interested parties may submit a quotation on an individual basis or jointly with other organizations. For jointly submitted quotations, there must be a lead organization. The organization, or the lead organization in case of joint submission, must have a sustainable governance structure and institutional arrangement responsible for the provision of the training service. The lead organization should also be the single point of contact with HKPC.

## ASSESSMENT OF QUOTATION

10. The assessment will be based on the following factors:

Evaluation Criteria	Marks
(A) Company Profile Relevant experience, knowledge, capability and expertise of the service provider	15
(B) Proposal i) Curriculum of training course and execution plan ii) Terms & Conditions that allow a win-win situation	35
(C) Experience Relevant experience of the trainer and training assistant	10
(D) Price	25
	Total 100

Score for Price is calculated below:

A maximum price score of 25 will be allocated to the lowest bid which fulfills all compulsory requirements

Score for other offers will be calculated based on the following formula:

$$25 \times \frac{\text{lowest price of tender offer which fulfils all compulsory requirements}}{\text{price of the other tender offer}}$$

### COMPLETION OF QUOTATION

11. Interested parties should complete the schedules at the Annex in the manner described herein. Any other relevant reference materials could also be submitted.

### SUBMISSION OF QUOTATION

12. The quotation should be sent by post or delivered by hand to the following address in a sealed envelope marked CONFIDENTIAL – “Quotation: Training Services for IT Training Programme (Part II)” by **12:00 noon on 12 April 2010**:

Hong Kong Productivity Council  
IT Industry Development Division, HKPC Building, 78 Tat Chee Avenue,  
Kowloon Tong, Kowloon.  
Attention: Mr. C. K. Lee (Senior Consultant)

13. The quotation can be written in either English or Chinese, with THREE hardcopies and ONE softcopy on a CD-ROM.

14. In the event of a typhoon signal no. 8 or above being hoisted or a black rainstorm warning signal being issued between 9:00am and noon on the date for submission mentioned above, the closing date will be postponed to the first working day (excluding Saturday) after the day the typhoon sign no. 8 or above or black rainstorm warning signal is lowered.

**OTHER INFORMATION**

15. All works in the submission of quotation shall not contain any materials infringing any third party intellectual property rights. Interested parties shall indemnify and keep the HKPC/MEIIA fully and effectively indemnified against all costs, claims, demands, expenses and liabilities of whatsoever nature arising from or incurred for reason of any infringement or alleged infringement.

16. The HKPC/MEIIA shall have the absolute discretion to accept or reject any submission made without being liable to give any reason thereof. The HKPC/MEIIA shall be entitled to disclose or make copies of any of all of the received quotations for the purpose of considering the quotations and to keep such copies for record purposes.

17. The HKPC/MEIIA shall have the absolute discretion to accept part of the services offered by the service provider where the HKPC/MEIIA shall only pay for the services being engaged.

18. The HKPC/MEIIA reserves the right to negotiate with any of the service providers about the terms of the Quotation and combination of courses.

**ENQUIRY**

19. For any enquiry related to this document, please contact:

Mr. C. K. Lee, Senior Consultant, HKPC

Tel: 2788 5855

Fax: 2788 5860

Email: [ck@hkpc.org](mailto:ck@hkpc.org)

**ANNEX**

20. Schedules to be submitted by the interested party.

## **Schedule 1 – Service Provider Profile & Related Experiences**

This Schedule should include the following:

- a) Name of the interested party;
- b) Background of the interested party;
- c) Contact information of the responsible officer(s) – name, post title, correspondence and email address, etc.;
- d) Relevant experience from the interested party; and
- e) Any other information considered by the interested party to be relevant to the assessment of the quotation.

## **Schedule 2 – Offers/Services to be provided**

This Schedule should include the following:

- a) Detailed curriculum of each training course selected from the Course List;
- b) Approach or execution plan to deliver the training service (including the production and delivery of training class and training materials);
- c) CV of the Trainer to be responsible for the training course selected from the Course List;
- d) CV of the Training Assistant to be responsible for course material preparation and class facilitation; and
- e) Any other information considered by the interested party to be relevant to the assessment of the quotation.

## **Schedule 3 – Fee Proposal**

This Schedule should include the following:

- a) Monthly charge rate of Trainer\*;
- b) Monthly charge rate of Training Assistant\*;
- c) Payment terms;
- d) Validity period;
- e) Any other terms and conditions considered by the interested party to be relevant to the assessment of the quotation.

\*Note: For each 60 hours of training delivered, one equivalent month will be chargeable for the Trainer and Training Assistant. For the last installment where training hours less than 60 are delivered, the training fee will be calculated on a pro rata basis.