

REQUEST FOR QUOTATION

TRAINING SERVICES (PART I)

FOR

THE 2009/10 IT TRAINING PROGRAMME FOR SMEs

Issued

By

Hong Kong Productivity Council

30 Oct 2009

Ref: MEIIA-RFQ-091030

## 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 one (or more) 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 (Target: 1,200 participants)	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 (Target: 800 participants)	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 (Target: 500 participants)	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	Sep 2009	Nov 2009
b.	Training Program Promotion	Dec 2009	May 2010
c.	Training Course Rollout (Part 1)	Jan 2010	Mar 2010
d.	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 for 3 months to conduct a series of the training classes selected from the Course List specified below;
  - Engage a Training Assistant for 3 months 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;
  - Provide printed copy of training material for class attendants; and
  - Conduct and complete **180 – 190 training hours within 3 months, delivering at least 5 different courses.**

### 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 training hours should be at least 180 and no more than 190. No merit will be given to provider with more hours.

### I. Technical Series

1.	Course name:	Open Source Software (OSS) Fundamental for SMEs
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 – 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:	2 – 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:	CRM Workshop for SMEs
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 – 3 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to use a CRM system for: <ol style="list-style-type: none"> <li>a) Customer Management: Manage customer particulars and keep related business activities, quotation and sales order</li> <li>b) Contact Management: Keep contact information and related business activities</li> <li>c) Sales Activities: Keep quotation and sales related records</li> <li>d) Quotation Management: Keep quotation document and related sales activities</li> <li>e) Sales Ordering: Keep sales order document and related follow-up activities</li> <li>f) Business Activities: Record related business activities</li> <li>g) Calendar: Handle event management in a calendar view</li> <li>h) Product Profile: Manage product information</li> </ol> <p>The SugarCRM will be used as an example to demonstrate the processes.</p>
	Target audience:	Marketing; general SMEs
	Prerequisite:	Nil
	Other conditions:	Nil

4.	Course name:	Online Retailing, Wholesaling and Trading System Workshop
	Type:	Classroom training
	Duration:	8 hours (four 2-hour sessions)
	Frequency:	2 – 3 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

5.	Course name:	Powerful Open Source Software (OSS) Tools for SMEs
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 – 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

6.	Course name:	MySQL Database Management Workshop
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 – 3 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to: <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

7.	Course name:	Information Security Protection in a SME environment
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 – 3 classes
	Size:	15 – 20 participants per class
	Description:	The participants will learn how to: <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

8.	Course name:	RFID Technology and its Application in the Industries
	Type:	Classroom training
	Duration:	4 hours (afternoon session)
	Frequency:	1 – 2 classes
	Size:	15 – 20 participants per class
	Description:	The participants will be educated: <ul style="list-style-type: none"> <li>- What's RFID technology</li> </ul>

		<ul style="list-style-type: none"> <li>- The devices of RFID system</li> <li>- How RFID system could be implemented in various processes</li> <li>- To share cases and experience of RFID applications</li> <li>- Exercise: to design a simple RFID system in scenario</li> </ul>
	Target audience:	<ul style="list-style-type: none"> <li>- Scholars</li> <li>- IT companies</li> <li>- Enterprises' IT department staff</li> <li>- Engineers</li> </ul>
	Prerequisite:	Basic understanding of the process in their own industry
	Other conditions:	Nil

9.	Course name:	Unix/Linux Fundamentals
	Type:	Classroom training
	Duration:	24 hours (eight 3-hour sessions)
	Frequency:	1 – 2 classes
	Size:	10 – 15 participants per class
	Description:	<p>The participants will learn about:</p> <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

10.	Course name:	Linux System Administration
	Type:	Classroom training
	Duration:	30 hours (ten 3-hour sessions)
	Frequency:	1 – 2 classes
	Size:	10 – 15 participants per class
	Description:	<p>The participants will learn about:</p> <ul style="list-style-type: none"> <li>- System Installation and Configuration</li> <li>- Managing Software and Devices</li> <li>- Managing Security for Users and Groups</li> <li>- X Window System Administration</li> </ul>

		<ul style="list-style-type: none"> <li>- File System and Kernel</li> <li>- Shell and Perl Scripting</li> <li>- System Control and Troubleshooting</li> <li>- Networking and Apache Web Server</li> </ul>
	Target audience:	- MIS, System Administrator
	Prerequisite:	IT background
	Other conditions:	Nil

## II. Management Series

1.	Course name:	Maximizing the Cost Effectiveness of IT
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 – 3 classes
	Size:	15 – 30 participants per class
	Description:	<p>The participants will learn about:</p> <ul style="list-style-type: none"> <li>- ERP discipline for IT – ITSM</li> <li>- How IT is measured (Metrics) on an enterprise’s value drivers</li> <li>- How to use both ROI (Return On Investment) and TCO (Total Cost of Ownership) hand in hand to measure cost effectiveness throughout the project and service delivery process</li> </ul>
	Target audience:	Management, MIS, Marketing
	Prerequisite:	Basic computer literacy
	Other conditions:	Nil

2.	Course name:	Practical Intellectual Property Management of IT
	Type:	Classroom training
	Duration:	12 hours (four 3-hour sessions)
	Frequency:	2 – 3 classes
	Size:	15 – 30 participants per class
	Description:	<p>The participants will learn about:</p> <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> </ul>

		<ul style="list-style-type: none"> <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

3.	Course name:	Operation Management Skills For SMEs
	Type:	Classroom training
	Duration:	16 hours (four 4-hour sessions)
	Frequency:	2 – 3 classes
	Size:	25 – 30 participants per class
	Description:	<p>Through case studies and team work, the participants will learn how to:</p> <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

4.	Course name:	Cost Accounting For Trading, Retail and Manufacturing
	Type:	Classroom training
	Duration:	16 hours (four 4-hour sessions)
	Frequency:	2 – 3 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn about:</p> <ul style="list-style-type: none"> <li>- Direct costs, indirect costs, and their relationship with work process or event</li> <li>- Map an enterprise under marginal cost accounting concept</li> <li>- How to roll-out the solution within an enterprise</li> </ul>

		Remarks: GPK Accounting, also called Marginal Planned Cost Accounting, will be followed to illustrate the concept. It is developed in Germany in the late 1940's and 1950's. It is being designed to provide a consistent and accurate application of how managerial costs are calculated and assigned to a product or service. Its objective is to provide meaningful insight and analysis of accounting information. It addresses the needs of both financial and managerial accounting functionality and costing requirements.
	Target audience:	Management, Financial Controller, Cost Accountant, Accountant, Plant Manager, Project Manager
	Prerequisite:	Nil
	Other conditions:	Nil

5.	Course name:	Collaborative Office Automation to enhance multi-departmental cooperation productivity
	Type:	Classroom training
	Duration:	3 hours (one 3-hour session)
	Frequency:	2 – 3 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

6.	Course name:	Disaster Recovery & Business Continuity Management – be prepared for the unthinkable
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 – 3 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:	Cross-border operations preferred

7.	Course name:	Green IT – environmental sustainable computing
	Type:	Classroom training
	Duration:	3 hours (one 3-hour session)
	Frequency:	2 – 3 classes
	Size:	15 – 20 participants per class
	Description:	<p>The participants will learn how to:</p> <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

8.	Course name:	Information Resources and Budgeting for IT
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 – 3 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

9.	Course name:	Selecting a software solution – build or buy
	Type:	Classroom training
	Duration:	6 hours (two 3-hour sessions)
	Frequency:	2 – 3 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

10.	Course name:	Information Management 5S program for SME
	Type:	Classroom training
	Duration:	8 hours (two 4-hour sessions)
	Frequency:	2 – 3 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> </ul>

		<ul style="list-style-type: none"> <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

## 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	35
	ii) Terms & Conditions that allow a win-win situation	10
(C) Experience		
	Relevant experience of the trainer and training assistant	15
(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” by **12:00 noon on 9 Nov 2009**:

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: If the total number of training hours is less than 180 ultimately, the Fee paid to the Training Service Provider will be prorated based on the actual number of training hours delivered.