

**Provision of Services for
the Operation and Management of the kNOW Carbon House**

Schedule 1 – Marking Schedule and Guideline for Technical Proposal

The Tenderer should read the following marking schedule when preparing the technical proposal.
Score weighting of Technical Proposal vs. total Costs Tender = 70% : 30%

Section A- Execution Plan (85%)

The Execution Plan refers to the submission of a Tenderer that contains detailed proposals (including solutions) of how the Tenderer will carry out the Services or perform the Contract. It includes the following components as assessment criteria. Each component may be further divided into sub-components as necessary.

| Assessment Criteria on Technical Aspects | Maximum Mark | Passing Mark |
|---|---------------------|---------------------|
| Assessment Criterion (A1) – Services Plan | 20 | 10 |
| (i) To describe the arrangement for deploying sufficient and competent staff and volunteers (if applicable) for the implementation of daily operation and management services, including but not limited to the manpower plan (number of full-time workers / supporting staff to be engaged), their duties and division of labour and the daily workflow. A sample of one-week roster should be provided for reference. | | |
| (ii) To propose a staff management plan for maintaining quality services, including the frequency and content of training provided to the staff, covering on the operation and management of the House (counter and hotline services), as well as enhancement of their awareness to environmental-related issues, government policies and knowledge. | | |
| (iii) To describe the plan for house-keeping, hygiene maintenance and waste management to ensure cleanliness of the House, including how the cleaning and horticultural maintenance services will be provided (by inhouse or outsourced). | | |
| (iv) To describe the operation plan for handling booking-related matters, including the schedule (timeline and number) for issuing advance notice and reminder emails to successfully registered participants, the procedures to process last-minute booking cancellations or rescheduling requests, ad hoc individual public applications, as well as the special considerations for handling group bookings. | | |
| Assessment Criterion (A2) – Visit Programme Plan | 30 | 15 |
| (i) To describe how the guided tour will be designed and executed, and include examples illustrating the differences in the format, content, and interactive elements between the guided tours provided for primary schools versus community groups such as companies and organizations. | | |
| (ii) To propose two (2) interactive activities to be held on weekdays | | |

| Assessment Criteria on Technical Aspects | Maximum Mark | Passing Mark |
|--|--------------|--------------|
| <p>for each target visitor group stipulated in clause 3.3.1 of Appendix 2 (i.e. <u>Schools (Kindergartens, Primary Schools, Secondary Schools), Community Groups, Family Groups and Individual</u>).</p> <p>(iii) To propose three (3) upgraded activities to be held on weekends and public holidays, which are suitable for <u>Family Groups</u>. The proposed interactive activities shall be thematic and more appealing to the Family Groups, comparing to the proposed interactive activities for weekdays.</p> <p>(iv) To propose one (1) feasible post-visit task for each of the following target visitor groups: <u>Primary Schools, Secondary Schools, and Family Groups</u>. To suggest incentives to encourage visitors to complete the post-visit task and provide details on the task mode and format, as well as how to assess their takeaways from the House visit.</p> | | |
| <p>Assessment Criterion (A3) – Publicity Plan</p> <p>(i) To propose a comprehensive publicity plan to achieve the monthly target of 800 visitors. This plan shall provide concrete examples of the platforms and channels to be utilized for promotional activities, such as specific blogs, websites, Apps, and forums. The plan shall outline how various social media channels will be leveraged to reach the target audience effectively and drive visitor engagement. To suggest which key influencers, environmental advocates, and community organisations to collaborate with and outline possible cross-over content and joint events.</p> <p>(ii) To design a sample promotional post with visual to be shared on Facebook, Instagram and through eDM. The post shall be targeted towards a selected visitor group with an aim to promote low-carbon living and encourage people to register for a visit.</p> <p>(iii) To describe the remedial measures if the Contractor is unable to meet the targeted monthly visitors in the previous month.</p> | 10 | 5 |
| <p>Assessment Criterion (A4) – Decoration Plan</p> <p>(i) To propose a decoration plan of the House, taking Christmas as an example, with the proposed materials, design and the allocation of relevant items.</p> | 5 | 3 |

| Assessment Criteria on Technical Aspects | Maximum Mark | Passing Mark |
|---|---------------------|---------------------|
| Assessment Criterion (A5) – Innovative Suggestions (i) To propose innovative elements in the environmental education activities, public relations and marketing strategies that would enhance the branding awareness of the House to facilitate the promotion of the House. (ii) To propose ways or applications of innovative technology to enhance the visitor's experience of the visit programme carried out at the House. | 20 | 10 |

Section B – Experience (15%)

| Assessment Criteria on Technical Aspects | Maximum Mark | Passing Mark | Marking Guidelines |
|---|---------------------|---------------------|---|
| Assessment Criterion (B1) – Centre's Operation and Management Related (i) Experience of the key project team member OR the Tenderer's proven record and experience in operation or management of any visitor centers/ museums/ community service centres/ hospitality venue/ visitor attractions or equivalent. | 10 | 5 | <ul style="list-style-type: none"> • Holds > 7 years of relevant experience (100%) • Holds > 5 – ≤ 7 years of relevant experience (75%) • Holds > 3 – ≤ 5 years of relevant experience (50%) • Holds > 1 – ≤ 3 years of relevant experience (25%) • Holds ≤ 1 year of relevant experience (0%) or failing to produce documentary proof to support its claim of experience. |
| Assessment Criterion (B2) – Environmental Related (i) Experience of the key project team member OR the Tenderer's proven project record of and experience in recycling services and promotion of environmental protection awareness. | 5 | 3 | <ul style="list-style-type: none"> • Holds relevant experience for ≥ 3 projects (100%) • Holds relevant experience for ≥ 1 – < 3 projects (50%) • Holds relevant experience for < 1 project (0%) |
| Grand Total: | 100 | | |

1.1 Any proposal that fails to meet any of the passing scores specified above will fail the technical assessment and will not be considered further.

1.2 Score weighting of Technical Proposal vs. total Costs Tender = 70% : 30%

The maximum weighted Technical Score is 70. The Technical Proposal with the highest mark amongst the conforming Tenders will be given the maximum weighted Technical Score of 70. The maximum weighted Price Score is 30. The Price Proposal with the lowest price amongst the conforming Tenders will be given the maximum weighted Price Score of 30.

- 1.3 Each Tenderer's Technical Proposal and the Costs Tenders will be weighted and calculated with the following formulae:

$$\text{Technical Proposal (A)} = 70 \times \frac{\text{Mark of the Tender being assessed}}{\text{Highest mark amongst the conforming Tenders}}$$

$$\text{Price Proposal (B)} = 30 \times \frac{\text{Lowest price amongst the conforming Tenders}}{\text{Price of the Tender being assessed}}$$

- 1.4 The total score obtained by each Tenderer = (A) + (B)
- 1.5 Calculations should be rounded to the nearest two decimal places. In other words, figures with value at the third decimal place larger than or equal to 0.005 will be rounded up by adding 0.01 to the figures and curtailing the third decimal place onward, whereas figures with value at the third decimal place below 0.005 will be rounded down by curtailing the third decimal place onward without changing the value at the second decimal place.
- 1.6 Normally, the proposal that obtains the highest total score will be selected for acceptance. However, the ECC is not bound to accept any offer.

Schedule 2 – PRICE PROPOSAL
(To be submitted in the envelope A)

Part A

Mandatory Items

| Item | Description | Amount (HK\$) |
|---|--|--|
| Mandatory Services | | |
| | <u>Fixed Operational Cost</u> | |
| 1 | (a) Staffing (Clause 3.4 of Appendix 2) | (1a) _____ |
| | (b) Publicity Plan (Clause 3.6 of Appendix 2) | (1b) _____ |
| | (c) Festive Decorations (Clause 3.8 of Appendix 2) | (1c) _____ |
| | (d) Insurance (Clause 3.9.1-3.9.3 of Appendix 2) | (1d) _____ |
| | (e) Cleaning and Horticultural Maintenance Services (Clause 3.9.9-3.9.14 of Appendix 2) | (1e) _____ |
| | (f) Others and Miscellaneous (please specify: _____) | (1f) _____ |
| | Sub-total of Item A1 | _____ (1a+1b+1c+1d+1e+1f) |
| 2 | (a) Guided Visit Programme (monthly cost) (Clause 3.2 of Appendix 2) | (2a) _____ |
| | Sub-total of Item A2 (i.e. monthly cost of (2a) x 18 Services Months) | _____ (2a) x 18 |
| Total Amount of Mandatory Items (i.e. Item A1 + A2): | | _____ (Total Contract Price) |

Part B**Optional Services** (Notes 1 and 2)

| Item | Description | Unit Price (HK\$) (a) |
|-------------|---|----------------------------------|
| 1 | Provision of extending one (1) service hour of the kNOw Carbon House (Clause 3.1.7.2 of Appendix 2) | |
| 2 | Provision of one (1) session of 60-minute Upgraded Activity (Clause 3.2.11 of Appendix 2) | |
| 3 | Provision of one (1) session of 4-hour outreach activity for the promotion of the kNOw Carbon House (Clause 3.6.10 of Appendix 2) | |

Note 1: Subject to the operational need, the ECC may order the optional services and payment will be arranged together with the bi-monthly payment upon the completion of services. The ECC may vary the order number of option items or may choose not to order at all.

Note 2: It is at the sole discretion of the ECC's Representative to require the Operator to carry out all or any or none of the Items and the Operator shall do so accordingly. The ECC's liability shall be limited to the money payable in accordance with the schedule of rates for the amount of work completed to the standard acceptable to the ECC's Representative.

| | | | | | |
|---|--|-----------------|--|--------------|--|
| Signature and Name (in Block Letter) of Person Authorized to Sign Quotation: | | | | | |
| Name of Bidder in English (in Block Letter) and Company Chop (where applicable): | | | | | |
| Telephone No.: | | Fax No.: | | Date: | |

Schedule 3 – Technical Proposal

The Technical Proposal should normally be limited to 30 pages in length, excluding appendices, and should be in A4 size. Any photos/ images/ sketches for supporting should be placed in the appendices. It should be sensibly but not expensively bound and shall have a plain cover. The substance of the Tenderer Proposal should be described in accordance with the section headings proposed below.


The Tenderer should provide information on all items under each section headings while the information provided should be essential and kept in a simple and concise manner. All practical information included in the proposed plans submitted by the successful Tenderer shall form part of the Agreement. The Tenderer may use the following template to prepare the technical proposal.

Section A**Assessment Criterion (A1) – Services Plan (20%)**


- (i) To describe the arrangement for deploying sufficient and competent staff and volunteers (if applicable) for the implementation of daily operation and management services, including but not limited to the manpower plan (number of full-time workers / supporting staff to be engaged), their duties and division of labour and the daily workflow. A sample of one-week roster should be provided for reference.
- (ii) To propose a staff management plan for maintaining quality services, including the frequency and content of training provided to the staff, covering on the operation and management of the House (counter and hotline services), as well as enhancement of their awareness to environmental-related issues, government policies and knowledge.
- (iii) To describe the plan for house-keeping, hygiene maintenance and waste management to ensure cleanliness of the House, including how the cleaning and horticultural maintenance services will be provided (by inhouse or outsourced).
- (iv) To describe the operation plan for handling booking-related matters, including the schedule (timeline and number) for issuing advance notice and reminder emails to successfully registered participants, the procedures to process last-minute booking cancellations or rescheduling requests, ad hoc individual public applications, as well as the special considerations for handling group bookings.

Assessment Criterion (A2) – Visit Programme Plan (30%)

- (i) To describe how the guided tour will be designed and executed, and include examples illustrating the differences in the format, content, and interactive elements between the guided tours provided for primary schools versus community groups such as companies and organizations.
- (ii) To propose two (2) interactive activities to be held on weekdays for each target visitor group stipulated in clause 3.3.1 of Appendix 2 (i.e. Schools (Kindergartens, Primary Schools, Secondary Schools), Community Groups, Family Groups and Individual).

| Nature | Title | Brief | Target Group | Tutor(s) Required | Ref. Image | Finished Product Retained by Visitors? (if applicable) | Remarks (if any) |
|---------------------------|------------------------------------|--|---|-------------------|---|--|------------------|
| Craft making (Example) | Upcycled Beverage Cartons Coin Bag | Teaching the 3R concept by transforming beverage cartons into coin bag | Kindergartens | 1 |  | Yes | N.A. |
| | | | Primary Schools | | | | |
| | | | Secondary Schools | | | | |
| | | | Community Groups (companies or organisations) | | | | |
| | | | Family Groups | | | | |
| | | | Individual | | | | |

- (iii) To propose three (3) upgraded activities to be held on weekends and public holidays, which are suitable for Family Groups. The proposed interactive activities shall be thematic and more appealing to the Family Groups, comparing to the proposed interactive activities for weekdays.

| Nature | Title | Brief | Target Group | Tutor(s) Required | Ref. Image | Finished Product Retained by Visitors? (if applicable) | Remarks (if any) |
|-------------------|---|--|---------------|-------------------|---|--|-----------------------|
| STEM (Example) | Solar Powered Remote Control Car Workshop | Learning renewable energy and energy conservation by producing the solar toy car | Family Groups | 2 |  | Yes | 1:1 parent: kid ratio |
| | | | Family Groups | | | | |
| | | | Family Groups | | | | |

- (iv) To propose one (1) feasible post-visit task for each of the following target visitor groups: Primary Schools, Secondary Schools, and Family Groups. To suggest incentives to encourage visitors to complete the post-visit task and provide details on the task mode and format, as well as how to assess their takeaways from the House visit.

| Nature | Title | Brief | Target Group | Tutor(s) Required | Ref. Image | Way of Collection | Remarks (if any) |
|-----------------------------|----------------------|---|-------------------|-------------------|------------|-------------------|---|
| Writing <i>(Example)</i> | Letter to Big Waster | Having children who have visited the House to write letters to Big Waster, describing how they have changed their daily habits to adopt a low-carbon lifestyle. | Primary Schools | N.A. | / | Letter / Email | Good work may be featured on ECC's social media platforms |
| | | | Primary Schools | | | | |
| | | | Secondary Schools | | | | |
| | | | Family Groups | | | | |

Assessment Criterion (A3) – Publicity Plan (10%)

- (i) To propose a comprehensive publicity plan to achieve the monthly target of 800 visitors. This plan shall provide concrete examples of the platforms and channels to be utilized for promotional activities, such as specific blogs, websites, Apps, and forums. The plan shall outline how various social media channels will be leveraged to reach the target audience effectively and drive visitor engagement. To suggest which key influencers, environmental advocates, and community organisations to collaborate with and outline possible cross-over content and joint events.
- (ii) To design a sample promotional post with visual to be shared on Facebook, Instagram and through eDM. The post shall be targeted towards a selected visitor group with an aim to promote low-carbon living and encourage people to register for a visit.
- (iii) To describe the remedial measures if the Contractor is unable to meet the targeted monthly visitors in the previous month.

Assessment Criterion (A4) – Decoration Plan (5%)

- (i) To propose a decoration plan of the House for festive occasions, taking Christmas as an example, with the proposed materials, design and the allocation of relevant items.

Assessment Criterion (A5) – Innovative Suggestions (20%)

- (i) To propose innovative elements in the environmental education activities, public relations and marketing strategies that would enhance the branding awareness of the House to facilitate the promotion of the House.
- (ii) To propose ways or applications of innovative technology to enhance the visitor's experience of the visit programme carried out at the House.

Section B

The information provided in this part and the documentary evidence ^(Note 1) to substantiate its claim of experience will be assessed in technical assessment. ^(Note 2)

Assessment Criterion (B1) – Centre’s Operation and Management Related (10%)

Experience of the key project team member OR the Tenderer’s proven record and experience in operation or management of any visitor centers/ museums/ community service centres/ hospitality venue/ visitor attractions or equivalent.

| No. | Contract Period (Day/Month/Year) | | No. of years | Contract Value (HK\$) | Name of Client | Project Information |
|-----|-------------------------------------|----|-----------------|-----------------------------|-------------------|---------------------|
| | From | To | | | | |
| 1. | | | | | | |
| 2. | | | | | | |
| 3. | | | | | | |
| 4. | | | | | | |
| 5. | | | | | | |

*Please use additional sheet(s) if required.

Assessment Criterion (B2) – Environmental Related (5%)

Experience of the key project team member OR the Tenderer’s proven project record of and experience in recycling services and promotion of environmental protection awareness.

| No. | Contract Period (Day/Month/Year) | | No. of years | Contract Value (HK\$) | Name of Client | Project Information |
|-----|-------------------------------------|----|-----------------|-----------------------------|-------------------|---------------------|
| | From | To | | | | |
| 1. | | | | | | |
| 2. | | | | | | |
| 3. | | | | | | |
| 4. | | | | | | |
| 5. | | | | | | |

*Please use additional sheet(s) if required.

Note 1: Documentary evidence such as acceptance letter(s) to substantiate the claim of experience shall be submitted upon request by the ECC. Otherwise, the relevant claimed experience will not be taken into account.

- Note 2: Technical Assessment will be solely based on information of the Bidder's past experience as stated by the Bidder in Schedule 3 of its Quotation submitted on or before the Quotation Closing Time.
- Note 3: Only projects that are completed immediately preceding the Original Quotation Closing Date will be counted. Projects that are in progress or in the pipeline as at the Original Quotation Closing Date will not be counted.