

Jeanne Wong (ORKTS)

From: Derek Fong <DerekFong@erb.org> on behalf of Research ERB <RD@erb.org>
Sent: Thursday, 11 January 2024 4:45 pm
Subject: Invitation for Proposals by the Employees Retraining Board [Opinion Survey on ERB Training Courses and Services (2024-25)]
Attachments: (OS 2024-25) Assignment Brief.pdf; (OS 2024-25) Appendix 1-6.doc

Dear Sir / Madam

Invitation for Proposals on "Opinion Survey on ERB Training Courses and Services (2024-25)"

On behalf of the Employees Retraining Board (ERB), we would like to invite your company / institute to submit proposals for conducting the captioned survey. An assignment brief setting our requirements and relevant documents are attached for your reference.

We should be grateful if you could submit the following documents in TWO separate sealed envelopes **by 3:00 p.m. on 19 January 2024 (Friday)**. Late submission will NOT be accepted.

Envelope 1

- (1) Service Proposal (based on the format given in Appendix 2);
- (2) Technical Proposal (3 hard copies, with the bidder's own format);
- (3) Consent to Disclosure (based on the format given in Appendix 4); and
- (4) Confirmation Letter for Compliance with Anti-Collusion Clauses in Tender (based on the format given in Appendix 5).

Envelope 2

- Fee Proposal (based on the format given in Appendix 3)

Proposal not including the above five documents will NOT be considered.

Should you have any questions or require further information, please feel free to contact us by email at rd@erb.org.

Research & Development Section
Employees Retraining Board

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OPINION SURVEY ON ERB TRAINING COURSES AND SERVICES (2024-25)

ASSIGNMENT BRIEF

PURPOSE

The Employees Retraining Board (hereafter “ERB”) would like to appoint a well qualified research service provider to conduct an opinion survey on ERB training courses and services among trainees and their employers (hereafter “the Survey”).

BACKGROUND

2. The ERB is a statutory body established in 1992 under the Employees Retraining Ordinance. The ERB co-ordinates, funds and monitors training courses and services that are market-driven and employment-oriented so as to meet the changing needs of the employment market.
3. The ERB extended its service to cover people aged 15 or above with an educational attainment at sub-degree level or below in December 2007. The ERB repositioned itself in mid-2008. Since then, the ERB endeavours to foster the sustainable development of trainees, helps them attain recognised qualifications and map out their progression ladder.
4. In order to have a comprehensive and holistic review of ERB training courses and services among trainees and their employers, the Survey is conducted continuously to collect their feedback on training courses and services.

RESEARCH OBJECTIVES

5. The ERB intends to appoint a research service provider to conduct the Survey in 2024-25 which will:
 - (a) Find out trainees’ satisfaction level on ERB training courses and their enhancements in personal development / vocational skill level; and
 - (b) Determine employers’ satisfaction level on ERB trainees’ job performance, as well as their awareness of ERB training courses and their support given to employees.

SCOPE OF STUDY

6. The scope of the Survey comprises the following parts:

- (a) A quantitative survey among trainees; and
- (b) A quantitative survey among employers.

RESEARCH METHODOLOGY

7. Quantitative Survey among Trainees

(a) Target respondents

The target respondents are those trainees who completed the ERB training courses between October 2023 and September 2024.

(b) Data collection method

Telephone interviewing will be employed as the data collection method. The fieldwork will be conducted between March 2024 and February 2025 on a monthly basis.

(c) Sampling frame

A database of target respondents will be provided by the ERB on a monthly basis prior to commencement of fieldwork.

(d) Sampling method and sample size

Quota sampling by course type will be employed and approximate proportion of quota for each course type per month is listed as follows:

Course Type	Approximate proportion of quota for each course type per month
Courses for general public	
Generic Skills Courses	5% - 30%
Placement-tied Courses	20% - 60%
Skills Upgrading Courses	20% - 60%
Courses for special service targets <i>(including youth, new arrivals, ethnic minorities, persons with disabilities, persons recovered from work injuries, and rehabilitated ex-drug abusers and ex-offenders)</i>	5% - 10%

It is estimated that N=250 quota-matched and successful interviews are to be conducted per month and a total of N=3 000 quota-matched and successful interviews will be conducted in a year.

(e) Questionnaire

Questionnaire will be provided by the ERB prior to commencement of fieldwork. It is roughly estimated that the average interviewing time for a successful interview will last around 10 minutes.

8. Quantitative Survey among Employers

(a) Target respondents

The target respondents are those employers who have employed the trainee(s) that completed the ERB placement-tied training courses between October 2023 and September 2024.

(b) Data collection method

Telephone interviewing will be employed as the data collection method. The fieldwork will be conducted between November 2024 and December 2024.

(c) Sampling frame

A database of target respondents will be provided by the ERB prior to commencement of fieldwork.

(d) Sampling method and sample size

Random sampling will be employed. A minimum of N=250 to a maximum of N=350 successful interviews are to be conducted.

(e) Questionnaire

Questionnaire will be provided by the ERB prior to commencement of fieldwork. It is roughly estimated that the average interviewing time for a successful interview will last around 10 minutes.

SERVICE REQUIREMENTS

9. The research service provider appointed (hereafter “Contractor”) is required to provide full service of conducting the Survey including project management, fieldwork execution, data processing, quality control, data analysis and delivery of the required output. Outsourcing arrangement of any part of the service is not acceptable.

10. The mandatory requirements of the Survey are set out below:

(a) Recruitment and training of interviewers

The Contractor is responsible for recruiting interviewers for the Survey. Sufficient number of interviewers should be deployed for the Survey so as to ensure that the fieldwork can be completed as scheduled. Besides, the Contractor should establish and implement measures to ensure interviewers are equipped with good interviewing technique and in good interviewing manners.

Training of interviewers is to be provided by the Contractor prior to commencement of the Survey. The Contractor should conduct briefing session(s) to interviewers prior to commencement of fieldwork in order to introduce the Survey and go through the questionnaires in detail. Staff of the ERB will attend the briefing and de-briefing sessions organised by the Contractor. All training manuals / briefing manuals / interviewer guides are to be developed by the Contractor.

(b) Pilot test

For the Trainee Part, a pilot test should be conducted with at least 5 successful interviews by each interviewer. Those successful interviews conducted in pilot test would not be counted into the target sample size of the Survey.

For the Employer Part, a pilot test should be conducted with at least 5 role-playing interviews by each interviewer.

De-briefing session(s) should be conducted after the pilot test. The Contractor should inform the ERB of the pilot test results (including interviewing performance of each interviewer) and make recommendations, if any, and necessary amendments as required to improve the operation and questionnaire design.

(c) Fieldwork execution

Computer-Assisted Telephone Interview (i.e. CATI) is to be used to collect the required data.

Fieldwork should not be undertaken after ten o'clock at night throughout the entire contract period.

(d) Logistics and planning

Logistics and planning for the fieldwork of the Survey are the responsibilities of the Contractor. They include items such as printing, mailing / faxing of notification letters to the target respondents, if necessary, and setting up of a telephone enquiry hotline. All the associated costs including the costs of stationery, printing, postage, etc. should be borne by the Contractor.

(e) Response rate

The Contractor should ensure that the target response rates of at least 65% and 50% among trainees and employers respectively, and the results are not biased by non-contact and non-response cases. For the Trainee Part, the number of contacts to be provided to the Contractor will be based on the number of successful interviews required and the response rate proposed by the Contractor. The Contractor could request for replacement of contacts for the ineffective phone numbers. For the Employer Part, the number of contacts will be dependent on the number of employers who have employed the trainee(s) that completed the ERB placement-tied training courses between October 2023 and September 2024.

Calculation of Response Rate

$$\text{Response Rate} = \frac{\text{No. of Successful Interviews}}{\text{No. of Successful Interviews} + \text{Effective Phone No.}}$$

where Effective Phone No. includes:

- Appointment (預約再訪);
- Busy (暫時沒空);
- Respondent is not at home / not around;
- Halfway drop-out; and
- Reject interview.

Ineffective Phone No., if any, includes invalid phone no. (wrong phone no. /

dead tone / fax no. / pager no.), no answer (call was not answered in 6 attempts) and no such person.

All the invalid cases (e.g. incomplete cases, refused cases, etc) should be properly recorded and sample checked by senior interviewers, fieldwork supervisors and / or quality control checkers.

The Contractor should adopt appropriate measures to boost up the response rate and to minimise bias arising from non-contact and non-response. These will include, but not limited to, contacting the target respondents for not less than 6 times on different days and at different time of the day (i.e. composition of day-time and night-time). For the Trainee Part, time coverage of at least 6 times of contacting target respondents should also be included weekday and weekend.

(f) Fieldwork progress reports

After commencing fieldwork, weekly fieldwork progress reports including the contact results are to be prepared by the Contractor and submitted to the ERB during the fieldwork period. The fieldwork progress report should include, but not limited to, the progress summary and other information as requested by the ERB.

(g) Quality control measures

The Contractor should establish and implement quality control measures at various stages of the Survey to ensure a satisfactory standard of performance throughout the duration of the Survey. Such measures should include, but not limited to, the following:

- (i) Deploying / setting up an independent team to undertake quality control measures;
- (ii) Carrying out independent quality check of at least 15% of the cases completed by each interviewer through a mix of telephone back-check and listening back to the audio records for each part of the Survey. For suspected interviewers, additional quantity of completed cases should be checked;
- (iii) Using real-time monitoring system with a bugging system for multi-audiences to listen to the interviews and screen showing the answers that interviewers punch in to the CATI system during interviews simultaneously to keep track of the conduct of interviews by fieldwork supervisors and / or quality control checkers; and
- (iv) Audio-recording all successful interviews for the purpose of quality checks.

Staff of the ERB will conduct field visits to observe and listen to the conduct of interviews real-time. As for the completed cases, the ERB may specify the questionnaires should be sample checked by the Contractor and request to extract

particular audio-recorded cases for quality checking. The Contractor is expected to provide the particular audio-recorded cases in batches during the fieldwork period as requested by the ERB.

(h) Data processing

Editing, validation rules and coding manuals / code lists (for open-ended questions) are to be prepared by the Contractor.

Tabulation plan(s) detailing the statistical tables to be produced from the Survey results is / are to be prepared by the Contractor. All tabulations should be provided to the ERB before preparation of the written report.

(i) Data analysis

The Contractor is responsible for the analysis of findings from the Survey, including the compilation and presentation of findings as well as application of weighting for adjusting the sample proportion, statistical significance testing, and other techniques and analysis models being employed.

SURVEY REPORT AND DATA FILE

11. The mandatory requirements of the report and data files are set out below:

- (a) Written report is to be prepared by the Contractor. Report in Chinese with executive summary, detailed findings, conclusion and recommendations, supplemented by data files, data tabulations shall be produced taking into consideration the comments of the ERB. Sub-group analysis by course type and comparison of Survey findings to previous year(s) should be included in the report. The report should also contain any appendices, references and relevant working papers to support the findings, conclusion and recommendations.
- (b) Cleaned data files are to be prepared by the Contractor and submitted to the ERB. The data files should be in the SPSS format with respondents' information, weighting factors, variable labels and values well-defined and in Microsoft Excel format with respondents' information, weighting factors, variable labels, values and code lists well-defined in separate documents.
- (c) A verbal presentation of the Survey findings is to be made to the ERB. The presentation is expected to last about 1 hour, supplemented with presentation slides as appropriate.

CONTRACTOR'S OFFICE, STAFFING AND PROJECT SCHEDULE

12. The mandatory requirements regarding the Contractor's office, staffing and project schedule are set out below:

- (a) The Contractor shall not, without the written consent of the ERB, assign or otherwise transfer this Survey or any part thereof to any other party. The Contractor shall maintain an office in Hong Kong for conducting the Survey (including fieldwork execution and data processing) during the entire contract period, under the direction of the Project Manager who shall assume full responsibility for the Survey.
- (b) The Project Manager should have at least 15 years of experience in conducting research projects. He / she should organise a project team comprising at least 2 Researchers, 1 Fieldwork Manager, 1 Data Processing Manager and sufficient number of fieldwork supervisors, interviewers and quality control checkers. No change in professional staff of the project team shall be made without written approval from the ERB.
- (c) The Survey would be confirmed by 9 February 2024 (Friday). The Contractor is required to complete the Survey by following the project schedule provided by the ERB at Appendix 1.

DELIVERABLES

13. Deliverables to be prepared by the Contractor and submitted to the ERB include:
- (a) Weekly fieldwork progress reports (including the contact results) (soft copy);
 - (b) Audio files for quality checking (in mp3 format);
 - (c) Cleaned data files;
 - (d) Tabulation plans, cross-tabulations and charts (soft copy);
 - (e) Written report in Chinese (soft copy and 1 hard copy);
 - (f) Verbal presentation of the Survey findings to the ERB; and
 - (g) Presentation slides (soft copy).

CONTROL OF SURVEY

14. The ERB will closely monitor the tasks related to the Survey. The Project Manager will have to liaise with the ERB throughout the Survey, report progress and meet with the ERB staff as and when necessary.

SUBMISSION OF PROPOSALS

15. Interested research service provider (hereafter “bidder”) is required to submit their proposals in **TWO SEPARATE SEALED ENVELOPES** with the following information to the ERB for consideration:

ENVELOPE 1

Mark “Private & Confidential - Technical Proposal for Opinion Survey on ERB Training Courses and Services (2024-25) [The bidder’s name]” and include:

- Completed and duly signed Appendix 2 – Service Proposal
- Completed and duly signed Appendix 4 – Consent to Disclosure
- Completed and duly signed Appendix 5 – Confirmation Letter for Compliance with Anti-Collusion Clauses in Tender
- Technical Proposal (3 hard copies, with the bidder’s own format)

ENVELOPE 2

Mark “Private & Confidential - Fee Proposal for Opinion Survey on ERB Training Courses and Services (2024-25) [The bidder’s name]” and include:

- Completed and duly signed Appendix 3 – Fee Proposal

16. **The project cost for the Survey must be stated in the “Fee Proposal” ONLY. Failure to do so will result in disqualification from further evaluation.**

17. Service Proposal should reflect whether the bidder will comply with the mandatory requirements as set out in the Section of “Service Requirements”. **Technical proposals will be evaluated only when the bidder agrees to fulfil all the mandatory requirements when conducting the Survey.**

18. The bidder should provide the elaboration with respect to the methodology and service requirements set out in this document. In particular, consideration, suggestions and / or information of the following areas should be shown in the Technical Proposal:

- (a) Background information relevant to the research topic;
- (b) Proposed areas of investigation to achieve the research objectives;
- (c) Sample design with sample size of sub-groups of respondents, feasible sampling method, sample representation and response rate;
- (d) Project setup and detailed project schedule for the whole research process;
- (e) Manpower arrangement, such as total number of man shifts to be employed and ratio of fieldwork supervisors to interviewers per shift;
- (f) Foreseen problems during fieldwork execution and provision of solutions;
- (g) Proposed analysis model and / or technique to be applied for data processing and

analysis;

- (h) Quality control measures for fieldwork;
- (i) Quality control measures for data processing; and
- (j) Relevant experience on the ERB projects, projects related to the research topic and social research in the past 5 years.

19. **The bidder has to provide information on all the areas in para. 18 (a)-(j) above (mandatory information). Failure to do so will result in the Technical Proposal being disqualified from further evaluation.**

20. The cost quoted in the Fee Proposal should reflect, and inclusive of, all the costs and expenses incurred in relation to or as a result of delivering the services described in the Section of “Service Requirements”.

21. The Fee Proposal should also state the cost for each successful interview of trainee and employer respectively, where the notional total project cost should be equal to the sum product of the number of successful interviews and the unit cost. The actual total project cost will therefore be the sum product of the respective unit cost stated in the Fee Proposal and the actual number of quota-matched and successful interviews conducted among trainees and employers during the contract period (with a maximum of N=3 000 samples for trainees and N=350 samples for employers).

22. The lowest fee bid may not necessarily be accepted as the successful bid. The ERB reserves the right to appoint more than one research service provider or not to appoint any research service provider to undertake the Survey. The ERB is not responsible for any costs incurred by the research service provider in the preparation of the proposals and the bidding process.

23. The bidder should submit the proposals in **TWO separate sealed envelopes** to Manager (Human Resources and Administration) of the ERB, and deposit the proposals in the **Tender Box** of the ERB during the office hours (from 9:00 a.m. to 6:00 p.m.), at 3/F to 6/F, 10 Siu Sai Wan Road, Chai Wan, Hong Kong.

24. **The ERB will not be held responsible for any loss or delay of proposals sent in by post. Irrespective of the means of submission, the proposals should reach the prescribed location by 3:00 p.m. on 19 January 2024 (Friday). Late submissions will not be accepted.**

EVALUATION CRITERIA

25. The ERB will first evaluate the Service Proposal of the bidders. Bidders with their Service Proposal complying with all mandatory requirements will be further evaluated by their Technical Proposal.

26. For Technical Proposal having provided all the mandatory information as required in para. 18(a)-(j), it will be further evaluated and carries 40% of the total weighting. Evaluation criteria of Technical Proposal include (i) research design / methodology (carries 20% of the technical weighting); (ii) research / fieldwork capability (carries 30% of the technical weighting); (iii) project management / quality control (carries 25% of the technical weighting); and (iv) company background / relevance of past study (carries 25% of the technical weighting).

27. Fee Proposal will be evaluated and carries 60% of the total weighting.

TERMS OF OFFER

28. The proposals will be vetted by the Executive Office of the ERB. Price is not necessarily the only determining factor in the selection of research service provider for conducting the Survey. The ERB is not obliged to accept the lowest price bid, and it reserves the right to negotiate with the selected research service provider regarding the price and other terms and conditions of the offer.

29. The ERB has the discretion to engage the selected research service provider to conduct either the whole or part(s) of the Survey as it sees fit.

30. Payment will be made upon completion of the Survey to the satisfaction of the ERB, and upon invoice received. The ERB shall pay the Contractor in the following manner:

Instalment	Amount Payable	Condition of Payment
1 st instalment	Actual number of quota-matched and successful interviews conducted among <u>trainees</u> in the <u>1st Quarter</u> * Respective Unit Cost	Upon completion of all deliverables up to the standard and requirements of the ERB
2 nd instalment	Actual number of quota-matched and successful interviews conducted among <u>trainees</u> in the <u>2nd Quarter</u> * Respective Unit Cost	
3 rd instalment	Actual number of quota-matched and successful interviews conducted among <u>trainees</u> in the <u>3rd Quarter</u> * Respective Unit Cost	
4 th instalment	Actual number of successful interviews conducted among <u>employers</u> * Respective Unit Cost	
5 th instalment	Actual number of quota-matched and successful interviews conducted among <u>trainees</u> in the <u>4th Quarter</u> * Respective Unit Cost	

31. Time is of the essence. The Contractor should engage and deploy sufficient manpower to conduct the Survey. Low response rate is not an acceptable reason for delay. In case of delay, the

ERB may impose a fine on the Contractor at a rate of 2% of the total service fee for the Survey for each day of delay.

32. The ERB reserves the right to require the Contractor to take necessary follow-up actions until the deliverables are up to the standard acceptable to the ERB. Performance of the service provider including, but not limited to, accessibility of project team, turnaround time for the ERB's inquiry, accuracy of deliverables, etc. will affect the chance of the service provider being invited for tendering and quotation for ERB's surveys, studies and projects in future.

33. The ERB shall have the right to disclose to any relevant person / party, whenever it considers necessary in the public interest, and in such form and manner as it deems fit, the fees payable by the ERB for engaging the service provider. For this purpose, bidder is required to complete the "Consent to Disclosure" form attached at Appendix 4 and enclose it in the Technical Proposal.

ANTI-COLLUSION

34. The bidder shall not communicate to any person other than the ERB the amount of any tender, adjust the amount of any tender by arrangement with any other person, make any arrangement with any other person about whether or not he or that other person should or should not tender or otherwise collude with any other person in any manner whatsoever in the tendering process until the bidder is notified by the ERB of the outcome of the tender exercise. Any breach of or non-compliance with this sub-clause by the bidder shall, without affecting the bidder's liability for such breach of rules and laws or non-compliance, invalidate his tender.

35. Sub-clause (para. 34) of this Clause shall have no application to the bidder's communications in strict confidence with his own insurers or brokers to obtain an insurance quotation for computation of tender price and communications in strict confidence with his consultants / sub-contractors to solicit their assistance in preparation of tender submission.

36. **The bidder is required to submit to the ERB a duly signed letter in the form set out in Appendix 5 to the effect that he understands and will abide by these clauses. The letter shall be signed by a person authorised to sign the contract on the bidder's behalf.**

CONDITIONS OF CONTRACT

37. **"Conditions of Contract" for the Survey are stipulated at Appendix 6. The Contractor who is awarded the Survey will be bound by the prescribed contract conditions. Bidders are advised to observe the respective conditions before submitting their proposals. Proposals not following the prescribed contract conditions would not be considered.**

ENQUIRIES

38. For enquiries regarding this document, please contact the Research & Development Section of the ERB at rd@erb.org.

Employees Retraining Board

January 2024

PROJECT SCHEDULE**OPINION SURVEY ON
ERB TRAINING COURSES AND SERVICES (2024-25)**

The Survey would be confirmed by 9 February 2024 (Friday). The Contractor is required to complete the Survey by following the project schedule as stated below:

(1) Quantitative Survey among Trainees

Quarter	Month	Fieldwork Period	Submission Date of QC Data File	Submission Date of Cleaned Data File	Submission Date of Full-year Tabulation
Q1	M01	1-18 Mar 2024	21 Mar 2024	16 Apr 2024	18 Mar 2025
	M02	2-18 Apr 2024	23 Apr 2024	16 May 2024	
	M03	2-20 May 2024	23 May 2024	6 Jun 2024	
Q2	M04	3-19 Jun 2024	24 Jun 2024	9 Jul 2024	
	M05	2-17 Jul 2024	22 Jul 2024	5 Aug 2024	
	M06	1-16 Aug 2024	21 Aug 2024	4 Sep 2024	
Q3	M07	2-19 Sep 2024	24 Sep 2024	9 Oct 2024	
	M08	2-18 Oct 2024	23 Oct 2024	6 Nov 2024	
	M09	2-18 Nov 2024	21 Nov 2024	5 Dec 2024	
Q4	M10	2-17 Dec 2024	20 Dec 2024	8 Jan 2025	
	M11	2-17 Jan 2025	22 Jan 2025	11 Feb 2025	
	M12	3-18 Feb 2025	21 Feb 2025	7 Mar 2025	

(2) Quantitative Survey among Employers*

Fieldwork Period	Submission Date of Cleaned Data File	Submission Date of Tabulation
1 Nov – 19 Dec 2024	21 Jan 2025	5 Feb 2025

* For the purpose of quality checks, particular audio-recorded cases should be provided in batches during the contract period.

(3) Overall

Submission Date of Written Report	27 Mar 2025
Verbal Presentation	To be confirmed

SERVICE PROPOSAL

(To be completed by Bidder)

**OPINION SURVEY ON
ERB TRAINING COURSES AND SERVICES (2024-25)**

SERVICE REQUIREMENT

The Contractor is required to provide full service of conducting the Survey including project management, fieldwork execution, data processing, quality control, data analysis and delivery of the required output. Outsourcing arrangement of any part of the service is not acceptable.

Please indicate (by putting “✓”) whether you will conduct the Survey according to the requirements set out in the Assignment Brief:

Mandatory Requirement	Reference*	Yes	No
● Recruitment and training of interviewers	10(a)		
● Pilot test	10(b)		
● Fieldwork execution - CATI system	10(c)		
● Fieldwork execution - Should not be undertaken after 10:00 p.m.	10(c)		
● Logistics and planning	10(d)		
● Response rate - At least 65% and 50% among trainees and employers respectively	10(e)		
● Response rate - At least 6 times of contacting target respondents on different days and at different time of the day for non-contact cases	10(e)		
● Fieldwork progress reports (weekly)	10(f)		
● Quality control measures - Independent quality control team	10(g)		
● Quality control measures - At least 15% of the cases completed by each interviewer should be checked through a mix of telephone back-check and listening back to the audio records for each part of the Survey	10(g)		
● Quality control measures - Real-time monitoring with a bugging system for multi-audiences to listen to the conduct of interview simultaneously	10(g)		
● Quality control measures - Real-time monitoring system to show the answers that interviewers punch in to the CATI system during interviews	10(g)		
● Quality control measures - Audio-recording of all successful interviews	10(g)		
● Quality control measures - Provide audio-recorded cases in batches during the fieldwork period	10(g)		
● Data processing	10(h)		

* Please refer to the corresponding paragraphs in the Assignment Brief for the details of mandatory requirements.

Appendix 2

Mandatory Requirement	Reference*	Yes	No
● Data analysis	10(i)		
Survey Report and Data File			
● Written report in Chinese	11(a)		
● Comparison of findings with previous year(s)	11(a)		
● Data files in SPSS format	11(b)		
● Data files in Microsoft Excel format	11(b)		
● Verbal presentation	11(c)		
Office, Staffing, Project Schedule and Deliverables			
● Office in Hong Kong (including fieldwork execution and data processing)	12(a)		
● Project Manager x 1 - At least 15 years of experience in conducting research projects	12(b)		
● Researchers x 2	12(b)		
● Fieldwork Manager x 1	12(b)		
● Data Processing Manager x 1	12(b)		
● Project schedule provided by the ERB	12(c)		
● Deliverables	13(a)-(g)		

* Please refer to the corresponding paragraphs in the Assignment Brief for the details of mandatory requirements

Consultant / Company / Organisation:

Name of Consultant /
Company / Organisation : _____

Name and Signature of
Authorised Person : _____
[Name in BLOCK LETTERS and, where applicable, company chop]

Date : _____

Contact Person of the Consultant / Company / Organisation:

Name : _____

Title : _____

Email Address : _____

Telephone No. : _____

Fax No. : _____

Address : _____

FEE PROPOSAL

(To be completed by Bidder)

**OPINION SURVEY ON
ERB TRAINING COURSES AND SERVICES (2024-25)**

Please quote the fee for conducting the Survey according to the requirements set out in the Assignment Brief.

<u>Trainees:</u>			
HK\$ _____	x	3 000 cases	= HK\$ _____
[unit cost for Trainees]		[maximum]	[maximum project cost for Trainees]
+			
<u>Employers:</u>			
HK\$ _____	x	350 cases	= HK\$ _____
[unit cost for Employers]		[maximum]	[maximum project cost for Employers]



TOTAL PROJECT COST[#] HK\$ _____ [maximum total project cost]

The actual total project cost will be the sum product of the respective unit cost stated above and the actual total number of quota-matched and successful interviews conducted among trainees and employers during the contract period (with a maximum of N=3 000 and N=350 samples respectively).

Consultant / Company / Organisation:

Name of Consultant /
Company / Organisation : _____

Name and Signature of
Authorised Person : _____
[Name in BLOCK LETTERS and, where applicable, company chop]

Date : _____

CONSENT TO DISCLOSURE

To: The Employees Retraining Board

**OPINION SURVEY ON
ERB TRAINING COURSES AND SERVICES (2024-25)**

We, _____, hereby
[Name of the Bidder in BLOCK LETTERS]
irrevocably authorise, consent and agree that if the Employees Retraining Board (hereafter “ERB”) agrees to engage us to carry out the captioned Survey, the ERB may, whenever it considers necessary in the public interest, and without any further reference to us, disclose to any relevant person in such form and manner as the ERB deems fit the fees payable by the ERB for engaging us.

We hereby waive and forego our right, if any, to make any claims against the ERB for any loss, damages, costs, charges, liabilities, demands, proceedings and actions that may arise out of or in consequence of such disclosure by the ERB.

Dated this _____ day of January 2024

* SEALED with the Common Seal of _____)
_____)
_____)
[Name of the Bidder in BLOCK LETTERS]

*affix common
seal of the
Bidder*

and _____)
SIGNED by _____)
_____)
[Name(s) of the signator(ies)],
the director(s) of the Bidder in the presence of:- _____)

Signature of Witness: _____

Name of Witness: _____

* To be adopted if the Bidder is a limited company.

To: The Employees Retraining Board

Dear Sir/Madam,

**OPINION SURVEY ON
ERB TRAINING COURSES AND SERVICES (2024-25)**

**CONFIRMATION LETTER FOR COMPLIANCE WITH
ANTI-COLLUSION CLAUSES IN TENDER**

We, _____ of
[Name of the Bidder in BLOCK LETTERS]¹

[Address of the Bidder]¹

_____ refer to our tender for the above Contract.

We confirm that before we sign this confirmation letter, we have been explained on and fully understood the anti-collusion clauses in the tender.

We confirm that as at the time of submission of this letter and other than the Excepted Communications referred to in the last paragraph of this letter we had not communicated to any person other than the Employees Retraining Board (hereafter “ERB”) the amount of any tender, adjusted the amount of any tender by arrangement with any other person, made any arrangement with any other person about whether or not we or that other person should tender or otherwise colluded with any other person in any manner whatsoever and undertake that at any time thereafter in the tendering process for the above Contract until the bidder is notified by the ERB of the outcome of the tender exercise and other than the Excepted Communications referred to in the last paragraph of this letter we will not communicate to any person other than the ERB the amount of any tender, adjust the amount of any tender by arrangement with any other person, make any arrangement with any other person about whether or not we or that other person should tender or otherwise collude with any other person in any manner whatsoever.

In this letter, the expression “Excepted Communications” means our communications in strict confidence with our own insurers or brokers to obtain an insurance quotation for computation of tender price and communications in strict confidence with our consultants or sub-contractors to solicit their assistance in preparation of tender submission.

[Signed for and on behalf of the Bidder]²

- 1. Where the bidder comprises two or more persons or companies acting in partnership, joint venture or otherwise, this part in square brackets should be expanded to include the respective names and addresses of such persons or as the case may be companies.*
- 2. Where the bidder comprises two or more persons or companies acting in partnership, joint venture or otherwise, all such persons or as the case may be companies must sign. The signatory for each of such persons or companies shall be a person authorized to sign the contract on behalf of that person or as the case may be company.*

CONDITIONS OF CONTRACT

WORKS / SERVICES TO BE PROVIDED

The Contractor agrees to organise and deliver the works and services for the Survey in the form of deliverables (“Deliverables”) set out in the “Technical Proposal”, in accordance with the ERB’s instruction and up to the ERB’s standard and requirement as set out in the Technical Proposal in consideration of the service fee to be paid by the ERB to the Contractor as stipulated herein.

TIME IS OF THE ESSENCE

Time is of the essence. The Contractor shall inform the ERB of any foreseeable delay with explanation for such delay. After consultation with the ERB, the Contractor shall revise the time schedule for the completion of the Survey and seek the ERB’s approval. Any delay without the ERB’s approval will constitute material breach of the Contractor’s duty entitling the ERB to terminate the Service Agreement forthwith upon giving written notice to the Contractor.

PROJECT FEE AND COST

Unless otherwise agreed by the ERB, the project fee of quoted in the Fee Proposal shall be the total consideration payable by the ERB to the Contractor for the works and services to be delivered by the Contractor pursuant to the terms and conditions of the Service Agreement issued by the ERB.

If the Contractor fails to complete the sample size by the timeline set out in the Technical Proposal, the Contractor shall pay or allow to the ERB a liquidated and ascertained damages at the rate of 2% of the total service fee for the Survey per day and the ERB may deduct the same from any monies due or to become due to the Contractor under the Service Agreement or the ERB may recover the same from the Contractor as debt.

STANDARD OF WORKS / SERVICES PROVIDED BY THE CONTRACTOR

The Contractor shall:

- (a) exercise all reasonable professional skill, care and diligence in the performance of the works / services as stipulated in the Technical Proposal.
- (b) comply promptly and diligently with all reasonable instructions from the ERB.
- (c) ensure that all deliverables (including raw data) under the Service Agreement shall meet the

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formatting and other requirements of the ERB. The ERB shall provide the necessary information to the Contractor in relation to its designated requirement and system and software configuration in the manner as stipulated in the Technical Proposal.

- (d) follow the financial policies and procedures of the ERB.
- (e) report to the ERB any errors, omissions and shortcomings of whatsoever nature of which the Contractor become aware of in the performance of the works / services and rectify the same in respect of any work done or information supplied by or on behalf of the ERB.
- (f) re-execute any defective works / services due to the default or negligence of the Contractor at no additional cost to the ERB.
- (g) indemnify the ERB against all claims, damages, losses or expenses arising out of or resulting from any default or negligence in or about the conduct of performance by the Contractor, its servants, agents, employees or contractors under the Service Agreement provided that the singular or cumulative indemnities of which shall be limited to the project fee and cost payable by the ERB for the works / services under the Service Agreement. Without prejudice to the ERB's other rights and remedies, the ERB shall have the right to withhold any outstanding payment to the Contractor to compensate for any losses or costs or expenses incurred due to the default or negligence of the Contractor.
- (h) ensure that all the Deliverables are accurate, reliable and precise free of any errors. The ERB shall have the right to terminate the Service Agreement forthwith upon giving written notice to the Contractor if the ERB is in its sole and absolute opinion considers that all or a significant part of the Deliverables are not accurate, reliable and precise.

INTELLECTUAL PROPERTY RIGHT

All deliverables and all improvements, specifications, source code, programming, raw data and other documentation that are conceived, designed, practised, prepared, acquired or developed by the Contractor either alone or together with others in the performance of its obligations, or provided by the ERB or its agents or advisers to the Contractor (collectively "Products of the Services") are and shall be the sole and exclusive properties of the ERB.

The Contractor undertakes that all Products of the Services conceived, designed, practiced, prepared, acquired or developed by the Contractor either alone or together with others in the performance of its obligations under the Service Agreement are original and proprietary free from any third party claims or encumbrances.

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All intellectual property rights associated with the Products of the Services shall vest in the ERB immediately upon their creation. The Contractor undertakes to execute all such documents and take all such steps as may from time to time be necessary or required by the ERB to secure to the ERB the said rights free from any third party claims or encumbrances.

Upon the request of the ERB or termination of the Service Agreement, the Contractor shall deliver all the Products of the Services in its possession, custody or control to the ERB.

Where the Contractor is allowed to use such Products of the Services with the agreement of the ERB, the Contractor shall only use such Products of the Services strictly for the purpose of its provision of works / services under the Service Agreement.

All designs, programme plans, methodology, database, systems software, photographs, drawings, prints, samples, patterns, dies, moulds or other tooling supplied by the ERB or prepared or obtained by the Contractor for and at the sole cost of the ERB shall be and remain the sole and exclusive property of the ERB. The Contractor shall not acquire by implication or otherwise any license in or any right or title to any such items and / or materials. The Contractor shall maintain all such items and materials in good order and condition and shall return them to the ERB in good order and condition upon termination of the Service Agreement or as and when requested by the ERB. The Contractor shall not use such items / materials nor shall it authorise or knowingly permit them to be used by anyone else for or in connection with any purpose other than the provision of works / services under the Service Agreement.

TERMINATION OF AGREEMENT

The ERB shall have the right to terminate the Service Agreement at any time by giving to the Contractor fourteen (14) days' prior written notice. In addition, the ERB shall have the right to terminate the Service Agreement at any time if the ERB is of the opinion that the engagement of the Contractor will be prejudicial to the image or goodwill of the ERB or the engagement of the Contractor will likely bring the ERB into disrepute.

The ERB shall pay the Contractor for any works / services which have been completed up to the standard and requirements of the ERB as at the effective date of termination of the Service Agreement. If the any instalment of project fee which has been received by the Contractor exceeds the estimated amount of work-in-progress of the Survey as assessed by the ERB, the Contractor shall return the excess amount to the ERB within seven (7) days of termination.

Without prejudice to its other remedies, either party shall have the right to terminate the Service Agreement immediately by giving written notice to the other party if the other party is in material breach of the Service Agreement and fails to remedy such breach within seven (7) days after

receiving notice to do so.

If the Contractor is in breach and the ERB terminates the Service Agreement as above, the Contractor shall refund the fee and cost of works / services it fails to deliver in accordance with the Service Agreement.

If the ERB is in breach and the Contractor terminates the Service Agreement as above, the Contractor shall be entitled to retain the deposit of the project fee or other expenses received by the Contractor as at the date of termination.

Termination of the Service Agreement for whatever reason shall not affect the accrued rights of the parties arising out of the Service Agreement up to the date of termination including but without limitation, the right to recover damages against the other and all provisions which are expressed to survive the Service Agreement shall remain in full force and effect.

CONFIDENTIALITY

The Contractor shall at all times keep the Products of the Services and other confidential and proprietary information of the ERB confidential and shall not disclose the same without the prior written consent from the ERB.

PUBLICITY

No publicity or any attempted publicity of the Survey or service by the Contractor shall be made, unless prior written consent is obtained from the ERB.

INSURANCE

The Contractor shall maintain proper and adequate insurance covering its employees, agents or contractors involved in the Survey, including researchers and respondents.

DECLARATION OF INTEREST

On appointment and during the continuance of the Service Agreement, the Contractor must declare any interest if it is considered to be in real or apparent conflict with the works / services provided by the Contractor under the Service Agreement. The Contractor or its associated companies shall not undertake any works or services, which could give rise to a conflict of interest, except with the prior written approval of the ERB.

In any event, the Contractor or its associated companies shall not undertake any works or services for

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a contractor in respect of a contract between that contractor and the ERB for which the Contractor is providing service to the ERB.

PROHIBITION OF SOLICITING AND ACCEPTING ADVANTAGES

The Contractor represents and warrants that the Contractor has not received any monies (or other advantage of value) from or given any monies (or other advantage of value) to the ERB or its agents or contractors and their respective directors, employees or officers in connection with the Survey. The Contractor acknowledges and agrees that any breach of the above will entitle the ERB to rescind or terminate the Service Agreement and / or delist the Contractor from the suppliers' list of the ERB without prejudice to any other remedies available to the ERB.

ENTIRE AGREEMENT

The Service Agreement (including the Service Proposal, the Technical Proposal and the Fee Proposal) constitutes the whole agreement between the ERB and the Contractor in respect of the Survey. All prior agreements, correspondence and expression of intent are hereby excluded and superseded by the Service Agreement.

The Contractor acknowledges that the ERB is entering into the Service Agreement in reliance upon the representations made by the Contractor in the Service Proposal, the Technical Proposal and the Fee Proposal.

GOVERNING LAW

The Service Agreement shall be subject to and construed according to the laws of the Hong Kong Special Administrative Region and the parties submit to the non-exclusive jurisdiction of the Hong Kong courts.

WAIVER

The failure of a party to insist upon strict adherence to any term of the Service Agreement on one or more occasion shall not be considered a waiver of that party's rights to future performance of such term, or deprive that party of the right thereafter to insist upon strict adherence to that term or any other term of the Service Agreement. Any waiver given shall be in writing.

ASSIGNMENT

The Contractor may not assign or subcontract the Service Agreement whether in whole or in part to any third party without the prior written consent of the ERB as the unique expertise of the Contractor

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is material to the Service Agreement. The Service Agreement may be assigned in whole or in part by the ERB without prior written consent of the Contractor.

SUBCONTRACTING

In the event that the Contractor subcontracts its obligations hereunder in the performance of the Service Agreement with the prior written consent from the ERB, the Contractor shall remain responsible for the performance of all subcontractors.

NO JOINT VENTURE OR PARTNERSHIP

Nothing in the Service Agreement shall create a joint venture or partnership between parties hereto. Neither party shall enter into or have authority to enter into any engagement or make any representation or warranty on behalf of or otherwise bind or oblige the other party hereto.

PRIOR OBLIGATION

The expiration or termination of the Service Agreement shall not relieve either of the parties of their prior respective obligations or impair or prejudice their respective rights against the other.

TAX

The Contractor shall be responsible for paying all taxes that the Contractor is required by law to pay as a result of any transaction or payments under the Survey.

- End -