**P R O F O R M A**

**Request for Market Information (“RFI”) for   
Provision of Call Centre Services for**

**Strategic Purchasing Programmes**

**of the Health Bureau**

To: Strategic Purchasing Office, Health Bureau

(Attn: Mr Ken CHAN**)**

**[by** **email:**  [**kchchan@healthbureau.gov.hk**](mailto:%20kchchan@healthbureau.gov.hk)]

(Please complete and return the Proforma with relevant supporting documents on or before **24 January 2025**)

In response to the RFI of the Strategic Purchasing Office (“SPO”), my/our company, with contact details provided in Part 1 below, would like to provide the information and relevant supporting documents in Parts 2 to 4 of this Proforma.

**Part 1 – Information of Supplier**

From:

(Name of the Company): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(please fill in)

Name and Post of Contact person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(please fill in)

Email:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Telephone no.:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(please fill in) (please fill in)

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*This document does not constitute any offer or invitation / solicitation of any offer in connection with the exercise described herein. Neither this document nor any activities in connection therewith shall create any legal obligations or liabilities in any way on the part of the Health Bureau or the Government of Hong Kong Special Administrative Region. Neither this document nor anything contained herein shall form the basis of any contract or commitment whatsoever. In responding to the RFI, a respondent shall be deemed to have agreed to all the terms of this Request for Market Information.*

**Purpose and Background Information of the RFI**

1. Purpose

The SPO of the Health Bureau of the Government intends to solicit market information about the provision of call centre services to support the enquiry handling, promulgation and operation of government-initiated healthcare programmes.

1. Background of Strategic Purchasing Programmes

It has been promulgated since the 2022 Policy Address and the Primary Healthcare Blueprint (published in December 2022) that it is the Government's goal to make every effort to revamp the healthcare system, shifting the current treatment-oriented, hospital-based structure to a prevention-focused, community-based system, and devote more resources to promote primary healthcare. The Blueprint sets out concrete recommendations and implementation plans, and outlines a strategic roadmap for the future development of primary healthcare in Hong Kong.

The Government is actively taking forward various initiatives to promote primary healthcare development in accordance with the Blueprint and will plan primary healthcare services and allocate resources through strategic purchasing with the support of the SPO, with a view to strengthening the primary healthcare services as a whole.

The Government launched the Chronic Disease Co-Care Pilot Scheme (“CDCC Pilot Scheme”) in November 2023, with a view to establishing a family doctor regime and positioning District Health Centres (“DHCs”) as a hub in fostering an expansion of the healthcare network at the community level. With DHCs, the Government will partner with the private healthcare sector to promote the concept of "family doctor for all" and collaborate with various healthcare professions to provide comprehensive, sustainable and people-centric primary healthcare services in the community.

To support the operation of various government-initiated healthcare programmes (“healthcare programmes”) including the CDCC Pilot Scheme, the Government is exploring the feasibility to have a call centre to handle inbound and outbound call enquiries for the various healthcare programmes (“Services”).

**Part 2 Service Requirements**

| **Column**  **I** | **Column**  **II** | **Column**  **III** | **Column**  **IV** |
| --- | --- | --- | --- |
| **Section** | **Service Required** | **Tick (🗸) the Appropriate Box**  *(For aspects “Not Comply”, please also provide alternative proposal, if any)* | |
| **Comply** | **Not Comply** |
| **1** | **Scope** | | |
| 1.1 | Operate the telephone hotlines of Healthcare Programmes to provide inbound and outbound call service including:   1. Handling of programmes related enquiries, feedback and complaints 2. Outbound calls for various purposes such as programme promulgation, audit and survey |  |  |
| **2** | **Operating Hours** |  |  |
| 2.1 | From 9:00 a.m. – 9:00 p.m. on Monday to Saturday (except Public Holidays and under adverse weather conditions i.e. when Tropical Cyclone Warning Signal no. 8 or above is hoisted or Black Rainstorm Warning Signal or “extreme conditions” announced by the Government is / are in force). |  |  |
| **3** | **Equipment, System and Facilities** |  |  |
| 3.1 | Conduct the Services in Hong Kong on such premises owned, leased, licensed, managed and/or occupied by the Contractor at its own expense during the Contract Period |  |  |
| 3.2 | Have all the necessary equipment and facilities in place at its own costs, including work stations, computers, headsets, IT software and call-recording software. |  |  |
| 3.3 | Provide call-recording, storage and retrieval capability for all inbound and outbound telephone call records |  |  |
| 3.4 | Have systems in place with call centre function capability to support hotline operations which should include but is not limited to, the ability to make automated pre-recorded responses, automatically distribute calls to call centre staff, allow multiple concurrent calls on the same telephone number, divert calls, hold calls, collect voicemails, and differentiate the call source, call inquiry nature, and call language type with such settings to be adjustable by Government from time to time |  |  |
| **4** | **Inbound Call Key Performance Indicators and Requirements** |  |  |
| 4.1 | Have systems in place to differentiate source and language type of inbound calls among various healthcare programmes and be able to handle multiple concurrent inbound calls at the same time and meet the Key Performance Indicators (“KPI”) |  |  |
| 4.2 | Handle overflow of calls using systematic and secure mechanism that may allow the enquirer to choose either (i) to wait for the call to be answered by a call centre staff, or (ii) to leave his/her contact details such as the name, contact number, and content of the enquiry to request a call-back |  |  |
| 4.3 | Divert all inbound calls which come in during any non-working day or non-operating hours to a voice mail system |  |  |
| 4.4 | Return voicemails on the same day, except for calls received within one (1) hour before close of business and during non-operating hours which shall be returned on the next working day |  |  |
| 4.5 | Record information related to a call-in and voicemail enquiry case (e.g. call period, handling staff ID, call nature, description of call, enquirer’s name, case nature, status, etc.) with assignation of unique reference number |  |  |
| 4.6 | Escalate any unresolved or long outstanding cases to the designated person according to the pre-defined triaging guideline of the Government and track the escalation history (e.g. to whom/where the escalation was made, the escalation date & time) of the case |  |  |
| 4.7 | Provide customer service support to complaint cases and reply to complainants |  |  |
| 4.8 | Meet the following Key Performance Indicators throughout contract period:  Monthly average call handling  At least 80% call answered by Call Centre staff |  |  |
|  | Monthly average call waiting time  At least 80% call answered in 20 seconds |  |  |
|  | Monthly resolution rate (case handled without escalation to Government)  At least 80% calls handled by Call Centre without escalation |  |  |
| **5** | **Outbound Call Requirements** |  |  |
| 5.1 | Provide outbound call line number that is not liable to being blocked by automated screening programmes |  |  |
| 5.2 | Make calls to reach each call recipient on the list provided. For any call recipient that is unreached at the first attempt, at least two (2) more attempts shall be made and at least four (4) hours apart or on a different day to be considered a completed call (3 unsuccessful attempts will be equivalent to 1 completed call) |  |  |
| **6** | **Staffing Requirements** |  |  |
| 6.1 | Assign a Project Manager to oversee the coordination, planning and management of the Services |  |  |
| 6.2 | Have a sufficient number of Call Centre operators and other necessary staff to provide the Services and maintain the KPI, including:   1. At least 1 Customer Service Supervisor to supervise the Call Centre Officers and ensure smooth and efficient delivery of Services with high quality 2. At least 4 dedicated Call Centre Officers providing at least 32 man-hour per day, during which the Call Centre Officers are assigned to conduct Services of this contract only and should not concurrently provide services for other contracts. |  |  |
| 6.3 | Adjust the number of dedicated Call Centre Officers to meet the KPI for the corresponding level of Monthly Basic Service Capacity supported and/or as required by the Government in accordance to fluctuation in the call volume |  |  |
| 6.4 | Assign staff to sub-teams with primary focus on specific healthcare programme(s) to enhance performance and ensure smooth implementation |  |  |
| 6.5 | Project Manager - Qualification and Experience   1. Possess bachelor’s degree in Hong Kong, or equivalent 2. Have at least five (5) years aggregated working experience (counting from the date of appointment) in project management, customer relations, public relations, call centre operation and/or marketing fields, of which at least four (4) years (counting from the date of appointment) should be accrued in supervisory and management level for staff and project / operation management |  |  |
| 6.6 | Customer Service Supervisor – Qualification and Experience   1. Have attained post-secondary education level of qualifications in Hong Kong, or equivalent (including certifications of bachelor degree, associate degree, top-up degree, and higher diploma qualifications or above) 2. Have at least three (3) years full-time working experience (counting from the date of appointment) in call centres / in the field of customer service 3. Have good command of spoken Chinese, including Cantonese and Putonghua, and English |  |  |
| 6.7 | Designated Call Centre Officers - Experience  Have at least one (1) years full-time working experience (counting from the date of appointment) in call centres / in the field of customer service. |  |  |
| **7** | **Knowledge Base and Training** |  |  |
| 7.1 | Provide on-going staff development training, including regular classroom briefing, sharing, and coaching on call / case handling, customer service skills, writing skills, programme guideline and policies, service knowledge, and the call centre systems knowledge for call centre administration and call handling |  |  |
| 7.2 | Construct, build-upon and maintain a knowledgebase developed by the Government to support the call centre staff to answer the enquiries and complaints from enquirers and integrate knowledgebase into call centre system with features such as searching, retrieving etc. |  |  |
| 7.3 | Provide periodic management report retrievable daily, weekly and monthly for the Government to identify the most frequently selected topics and questions |  |  |
| **8** | **Regular Reports** |  |  |
| 8.1 | Have automated and IT-assisted system in place to capture statistics including but not limited to staff total work time, call number and voice mail counts, call talk time, call admin handling times, call abandon number, call abandon time, and call waiting time by each individual healthcare programme basis and enhance the system if required for capturing the service statistics and producing service reports for submission to Government |  |  |
| 8.2 | Retain all data including, statistics, reports and recordings during the contract period and provide retrieval access upon request by Government within one (1) working day |  |  |
| **9** | **Incident Reporting** |  |  |
| 9.1 | Report, under designated channel and format, to Government, any incidents that have affected/may affect call recipients, the contractor’s staff, its facility, equipment and the provision of the services such as breakdown of equipment, IT failure, facility/environment-related issues and unavailability of manpower |  |  |
| 9.2 | Report the incidents to Government as soon as possible but in any event within twenty-four (24) hours of their identification |  |  |
| 9.3 | Conduct investigation, submit written reports with remedial measures proposed and take other follow-up actions against the reported incident to the satisfaction of the Government |  |  |
| **10** | **Complaint Management** |  |  |
| 10.1 | Provide various channels for receiving suggestions and complaints in providing the Services and have a complaint management mechanism in place for dealing with any complaints received expeditiously |  |  |
| 10.2 | Investigate complaint or incident with proper documentation on the recommendations and remedies and submit report to the Government |  |  |
| **11** | **Contingency Support** |  |  |
| 11.1 | Have contingency plans in place to deal with any incidents that may affect or disrupt the provision of services with a view to minimise the service impact on the Government and recipients of the services |  |  |
| **12** | **Emergency Support** |  |  |
| 12.1 | Render best effort to deploy adequate manpower, resources and equipment to facilitate the services in relation to, or arising from ad-hoc changes to Governments service requirements without any additional charge on such ad-hoc service provided |  |  |
| **13** | **Exit and Handover Plan** |  |  |
| 13.1 | Provide an exit plan stating the feasible arrangements for handover and data privacy handling to enable Government to minimise any disruption or deterioration of the services during contract expiry or termination |  |  |

**14. Service Period**

Your company is interested in providing the above Services for a period of: (you may tick more than one box)

☐ 2 years

☐ 3 years

☐ 4 years

**Part 3 Price Proposal**

1. **Monthly Basic Service Charge**

|  |  |  |
| --- | --- | --- |
| **Item** | **Description** | **Monthly Basic Service Charge**  **(HK$ per month)** |
| (1) | 1st level:  Provision of up to 5,000 calls per month, inclusive of inbound calls and outbound calls, (“Monthly Basic Service Capacity”) in accordance with the service requirements |  |
| (2) | 2nd level:  Provision of up to 7,500 calls per month, inclusive of inbound calls and outbound calls for the Monthly Basic Service Capacity in accordance with the service requirements |  |
| (3) | 3rd level:  Provision of up to 10,000 calls per month, inclusive of inbound calls and outbound calls for the Monthly Basic Service Capacity in accordance with the service requirements |  |

1. **Price for Additional Calls beyond Monthly Basic Service Capacity**

|  |  |  |
| --- | --- | --- |
| **Item No.** | **Description** | **Additional Service Charge** |
|  |  | **(HK$ Per Call**) |
| (4) | Provision of additional calls on top of the Monthly Basic Service Capacity irrespective of the utilised level with the scaled pricing **per call** below in accordance with the service specifications: |  |
| 1. 1st tier:   1 – 5,000 additional calls per month | (i) : |
| 1. 2nd tier:   5,001 – 10,000 additional calls per month | (ii) : |
| 1. 3rd tier:   10,001 – 15,000 additional calls per month | (iii) : |
| 1. 4th tier:   15,001 – 20,000 additional calls per month | (iv) : |
| 1. 5th tier:   20,001 – 25,000 additional calls per month | (v) : |
| 1. 6th tier:   25,001 – 30,000 additional calls per month | (vi) : |
| 1. 7th tier:   30,001 additional calls or above per month | (vii) : |

**Part 4 Optional Service Requirements**

*(please tick and provide input as appropriate)*

1. **Designated Caller ID for Outbound Calls**

The telephone number(s) designated as the hotline(s) of Healthcare Programmes will be provided by the Government.

To increase the response rate of the recipients, designated phone number(s) —ideally the hotline number — should be displayed as the caller ID for outbound calls, even if the call centre staff are dialling out from different internal extensions or phone numbers at the same time. To achieve this purpose, please answer the following questions on the technical feasibility:

1. Is it feasible to install the designated telephone line(s) provided by the Government in the call centre premises directly to serve the purpose of displaying the hotline number mentioned above?

☐ Yes (if yes, please answer question 2 below)

☐ No (please specify reason: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

1. Will the installed telephone line affect the service provision and functions of the call centre as specified in Part 2 above (e.g. voicemail, call recordings, handling of multiple inbound and outgoing calls at the same time)

☐ Yes (please specify the impact: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

☐ No, it will not affect the functions and fulfilment of all the service requirements.

1. What is the estimated lead time required for installation of telephone line at the call centre and set-up for the interfacing with systems of the call centre?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Please briefly describe if there is any alternative proposal to achieve the purpose of displaying the hotline number mentioned above?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Short Message Service (“SMS”) – Capacity and Price Information**
2. Does your company provide SMS service?

☐ Yes

☐ No

1. Is there a capacity constraint on the SMS service?

☐ Yes (Please provide details of capacity constraint e.g. maximum cap of SMS that can be issued per period of time): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ No

1. Please indicate the unit price for SMS service below:

|  |  |  |
| --- | --- | --- |
| **Item** | **Description** | **Unit Price**  (**HK$ per SMS**) |
| (5) | SMS notification sent to a local mobile telephone number |  |

1. **Mobile Survey – Capacity and Price Information**
2. Does your company provide services of conducting survey or audit through other means, e.g. mobile survey aside from telephone calls?

☐ Yes (Please provide details below and indicate the estimated price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

☐ No

1. Is there a capacity constraint on the mobile survey services?

☐ Yes (Please provide details of capacity constraint e.g. maximum cap of surveys that can be issued per period of time): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ No

1. Please indicate the unit price for mobile survey service below:

|  |  |  |
| --- | --- | --- |
| **Item** | **Description** | **Unit Price**  (**HK$ Per each survey completed by one (1) target participant**) |
| (6) | Conducting survey or audit through other means as specified above |  |

1. **Other Technological Assistance**

If your company can provide other technology-assisted methods for answering enquiries or facilitating communication with participants via the call centre, please elaborate on such methods below. Please state any pre-requisites and resources required on part of the Government (if applicable) and detail how your company will implement the methods.

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**END**