BEAM Society Limited

Expression of Interest (EOI) Briefing

Agreement No. TSD 1/2018 (AAS)

Information Technology (IT) Service on Design, Development and Maintenance for the BEAM Plus Assessment Automation System

25th July 2018

BEAM Society Ltd – EOI Briefing

AGENDA

- **Background**
- **Objectives of the Assignment**
- **Scope of Work**
- **Deliverables**
- **Brief Timeframe**
- **Submission**
- **Tentative Procurement Plan**
- **Reminder**
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Background

Background

- A **brief introduction** on:

  - BEAM Society Ltd ("**BSL**")

  - **Work** of BSL

  - BSL's **Roles** in the **Building and Environmental Industry**

- The **Primary Objectives** of Automation

- The **Key Attributes** of the **System** to be Developed and Implemented

Background

- An IT Service on, "The Design, Development and Maintenance for the BEAM Plus Assessment Automation System" (the "System"), was initiated and confirmed by the BEAM Society Limited in May 2018 to implement its online project assessment and submission service.

- A new web-based submission portal to **expedite** the **submission process** with **standardized** and **consistent** input/output, and an **on-line interactive tool** to **foster dialogue and exchange of views** among the BSL, Applicants, BEAM Assessors (BAS) and Project Teams in order to **facilitate the BEAM Plus assessment** to address the industry's demand.

Objectives of the Assignment

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- To **streamline** the **administration** of the **BEAM Plus assessment**;

- To promote **proper integrity**, **consistency**, **effectiveness** and **efficiency** of the BEAM Plus assessment;

- To facilitate **collaboration**, **information sharing** and **exchange** among the **BSL, Applicant, BAS and project team** throughout the **life-cycle of the projects**;

- To enhance **transparency** of the BEAM Plus assessment;

Objectives of the Assignment (Con't)

- To incorporate **historical** information and enable **audit**, and **tracking** of project progress and relevant data; and

- To avail a **database/repository** of **project data**, **assessment information**, **rulings and decisions** on the interpretation of the BEAM Plus Manuals which can be referenced by **authorized users** in **real time**.

Scope of Work

Scope of Work

- To **design**, **develop**, **implement** and **manage** an IT-enabled **cloud-based turnkey system**;

- To **re-engineer and automate** the **manual** assessment processes for the BSL;

- To **optimize** the **input/retrieval of project data**, the **assignment of BAS**, the project **review/decision-making** processes amid **assessment and approval** utilizing **precedent and ruling database**, the **sharing of knowledge database**, and the generation of **reports** for **analytical**, **statistical** and **certification** purposes;

- To provide a duration of **5-year system support, upgrade and maintenance**;

- To provide **backup solution**, including but not limited to, **the entire set of data** and any **redundant solution**;

Scope of Work (Con't)

- The IT Solution Provider (the "Provider") shall also **prepare necessary presentations required** during the preparation, design, development, acceptance, and training of the new System as below:-

  i. To **prepare and attend all meetings** with the BSL for the purpose(s) related to the activities of the Assignment;

  ii. To **conduct interviews** with the BSL staff, and any relevant industry stakeholders in relation to the Assignment;

  iii. To **report the monthly progress** of the Assignment to the BSL and its review committee and taskforce;

Scope of Work (Con't)

iv. To **present the deliverables** for the BSL comments and/or approval;

v. To **provide trainings with guideline/ handbook/ manual** to the BSL; and

vi. To **support the BSL to answer any queries** from the relevant **industry stakeholders** and **undertake improvement work** in relation to the Assignment.

Scope of Work (Con't)

- The Provider shall **design, develop, set-up, test, and maintain** the System, which encompasses the following **high-level purview**:-

    i. A **user-friendly** system serving **authorized persons** to input, review and modify the relevant information of their respective projects, and to be well-informed of **project progress**;

    ii. An **automated roster** for the assignment of **BAS,** that ensures an **impartial and unbiased** project allocation of BAS based on BAS's **personal particulars** and **availability;**

Scope of Work (Con't)

iii. A **clarification and resolution platform** which **enables dialogue during the course** of assessment and **after the completion** of assessment, whereby arriving assessment conclusions incorporating all the views and information provided by concerned parties, which is to be properly routed among parties and **fully documented** for future **reference by authorized parties**;

iv. A **project and management reporting system** to **facilitate review** of **assessment results** by **authorized parties** which include, but not limited to, the Technical Review Committee and its sub-committees and Expert Panels;

v.   A **knowledge database** to **accumulate and share** assessment knowledge which shall **enhance over time** with **input from different parties**;

vi.   Attend **all meetings** with the BSL and, as instructed by the BSL, deliver presentation, for the purpose(s) related to the activities of the Assignment; and

vii. Assist the BSL to **apply funding** from, including but not limited to, the Innovation and Technology Fund for Better Living.

Note: Detailed scope – ***General Requirements in the Assignment Brief***

Scope of Work (Con't)

## Extracted materials (Figures 1-7) of General Requirements
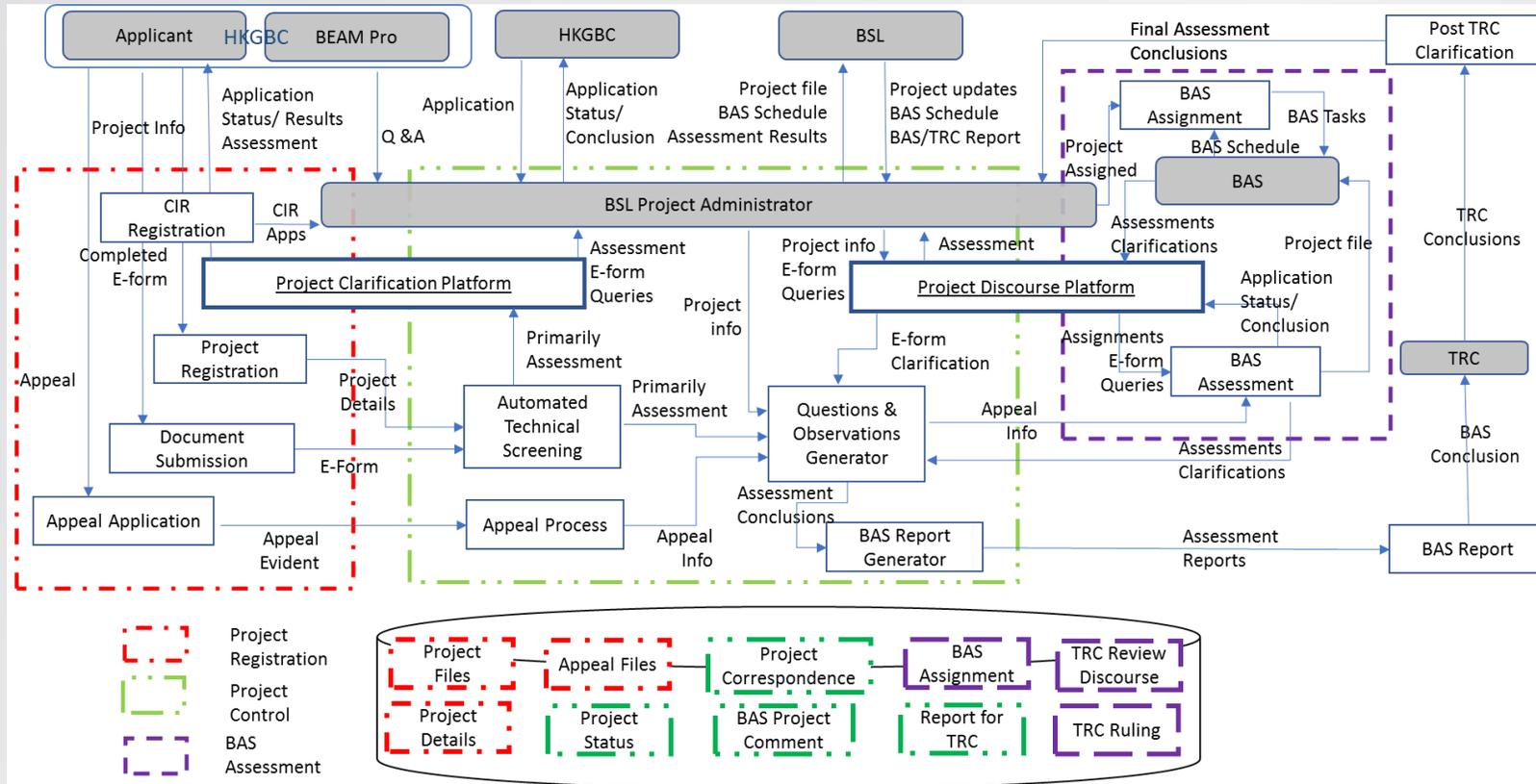
Figure 1: High-level view of the process flows within the organization
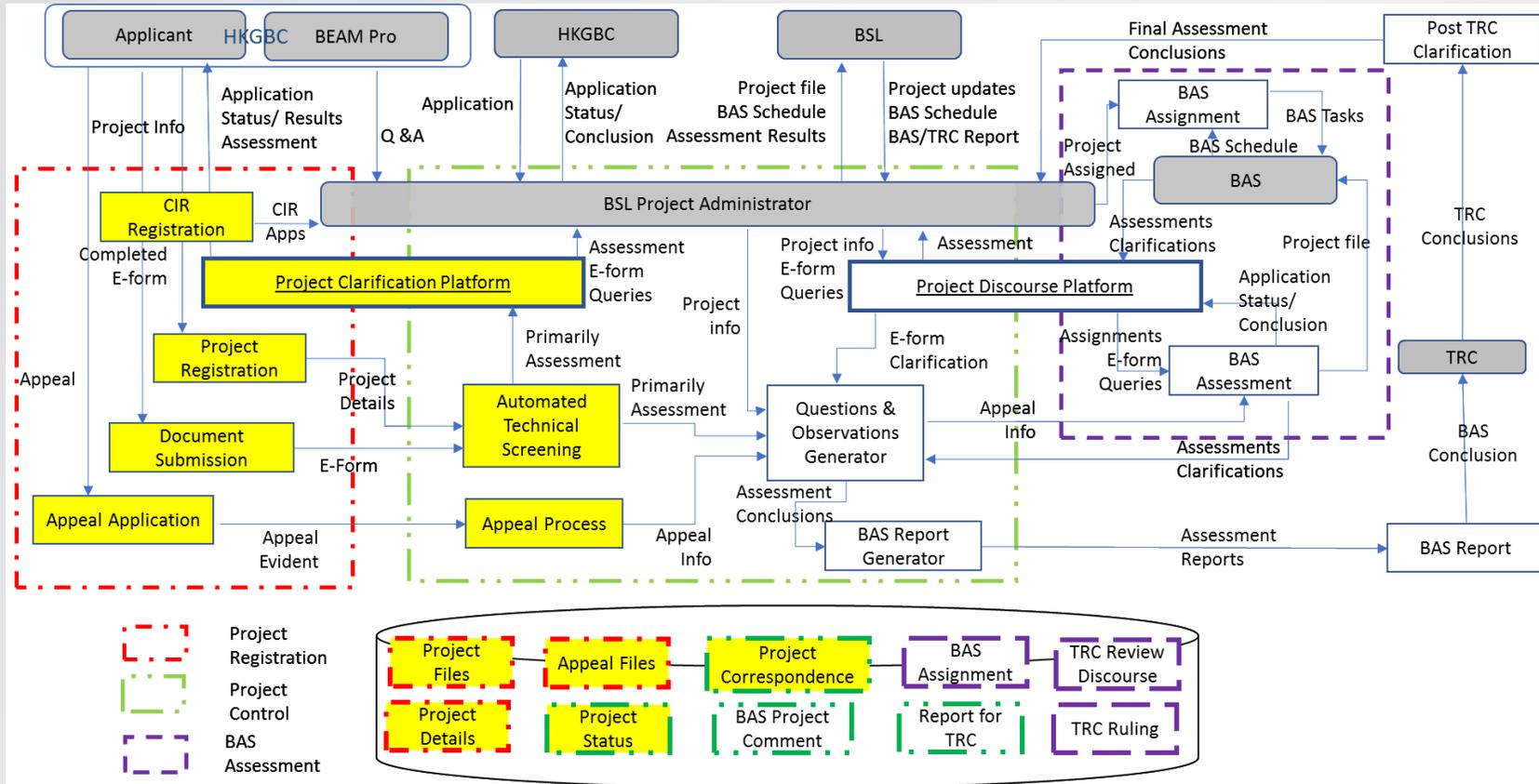
Figure 2: High-level view of the processes and data involved during the project input/control.
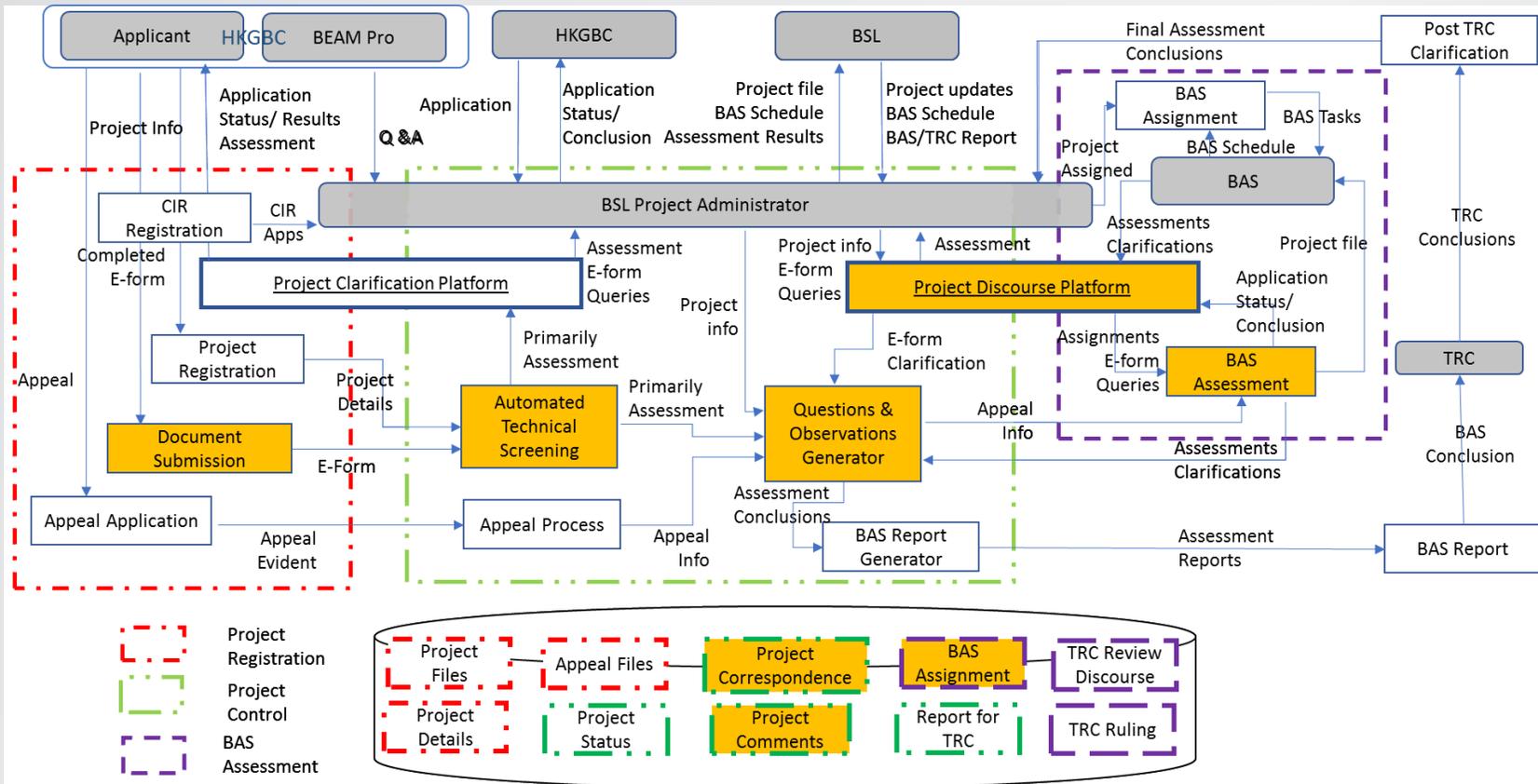
Scope of Work (Con't)

Figure 3: High-level view of the processes and data involved amid the e-form submission

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Scope of Work (Con't)
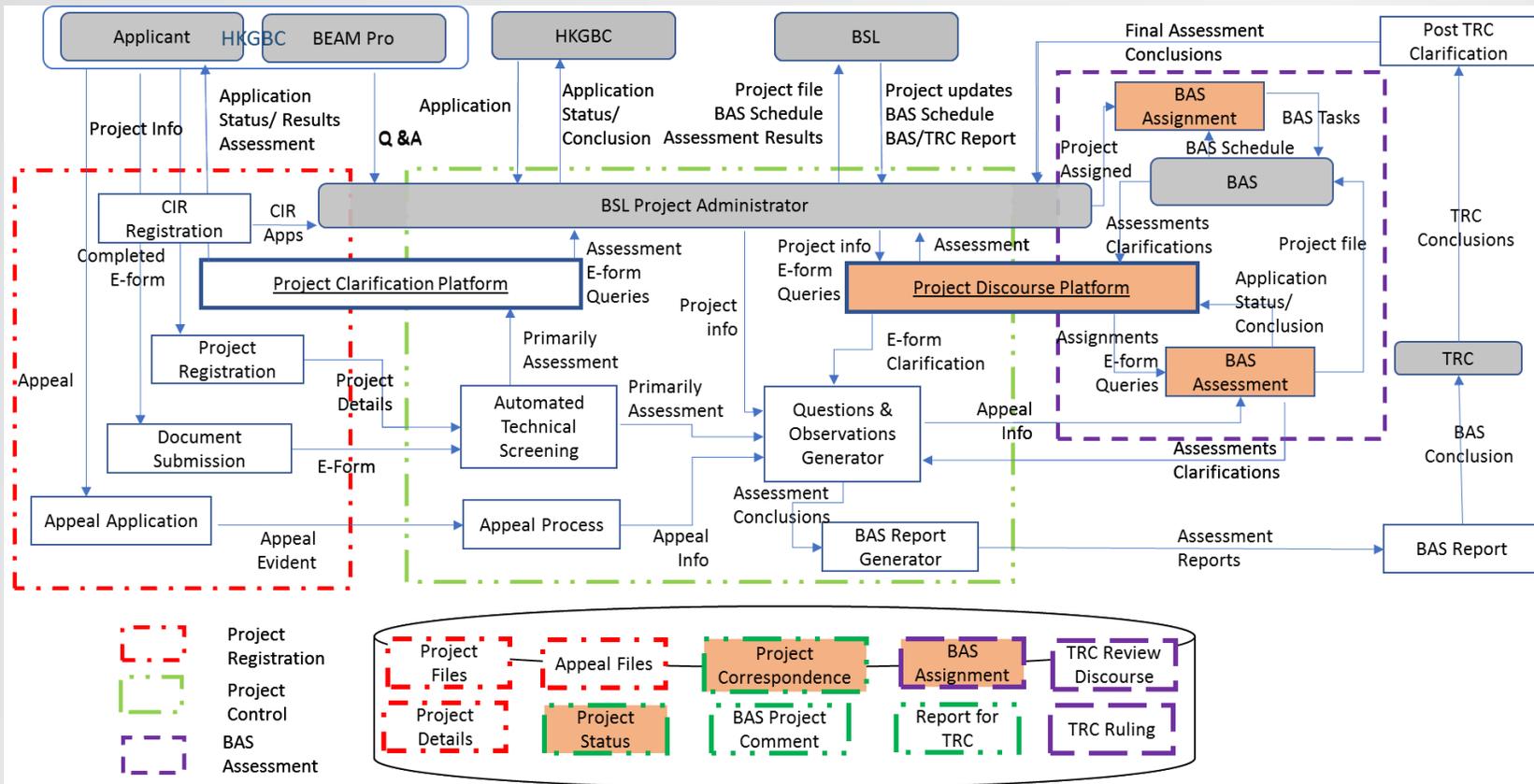
Figure 4: High-level view of the processes and data involved for BAS associated assignment and project scheduling

Scope of Work (Con't)
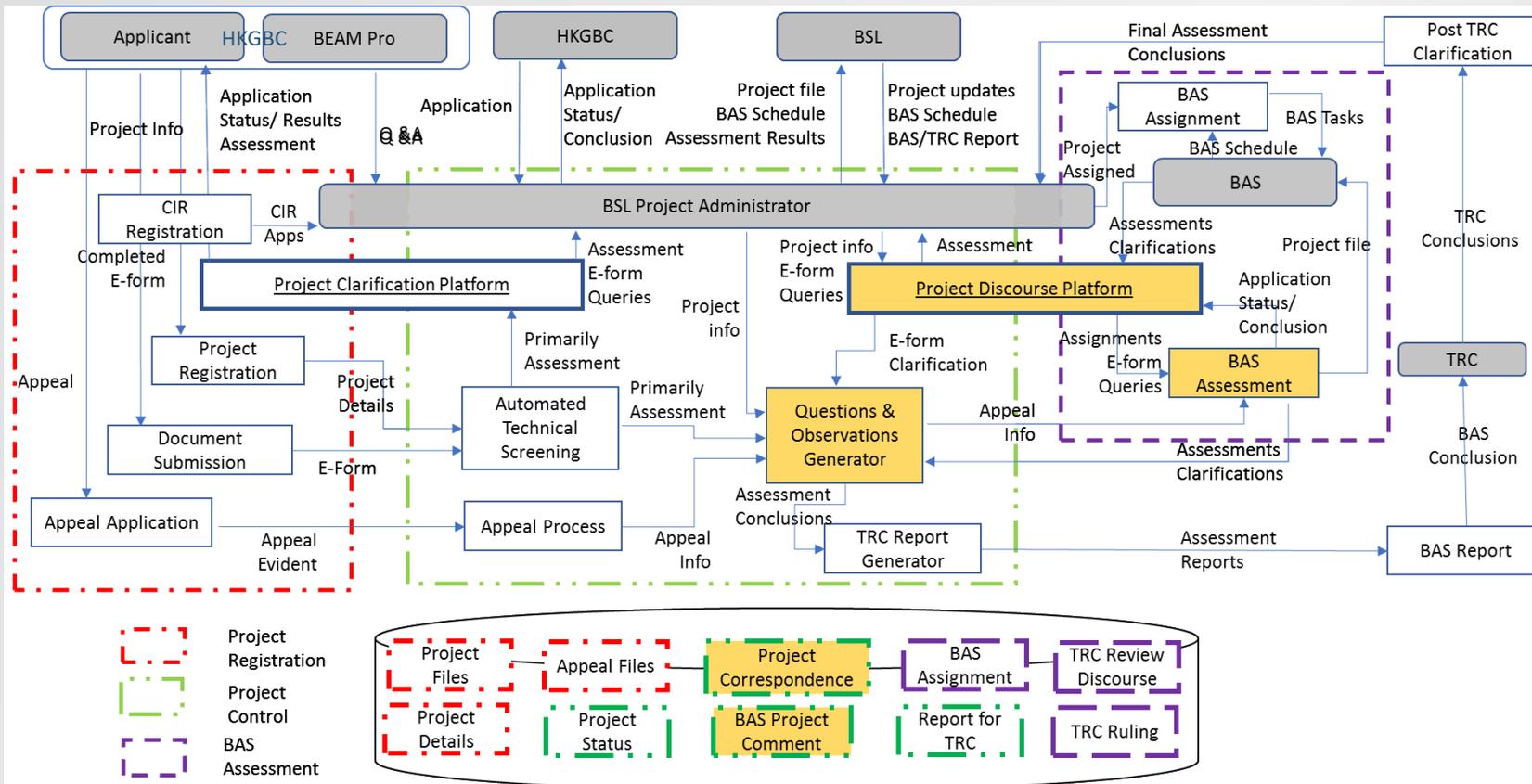
Figure 5: High-level view of the processes and data involved in online communication

Figure 6: High-level view of the processes and data involved in TRC Review and Conclusion
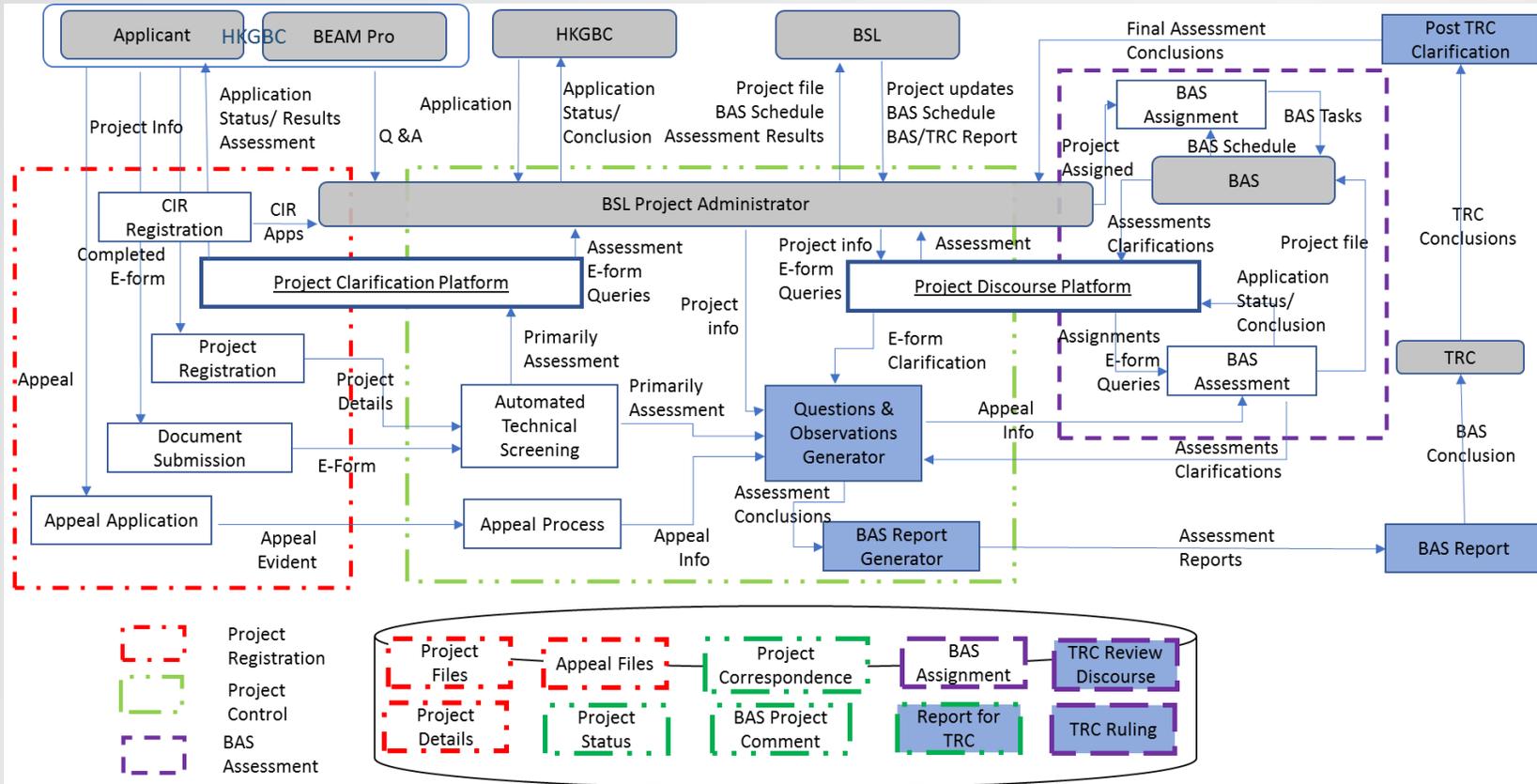
Stream: TRC reporting and review
Assessment conclusion, appeal information, will be compile as Report for TRC review, upon approval, the final conclusion will be noted.
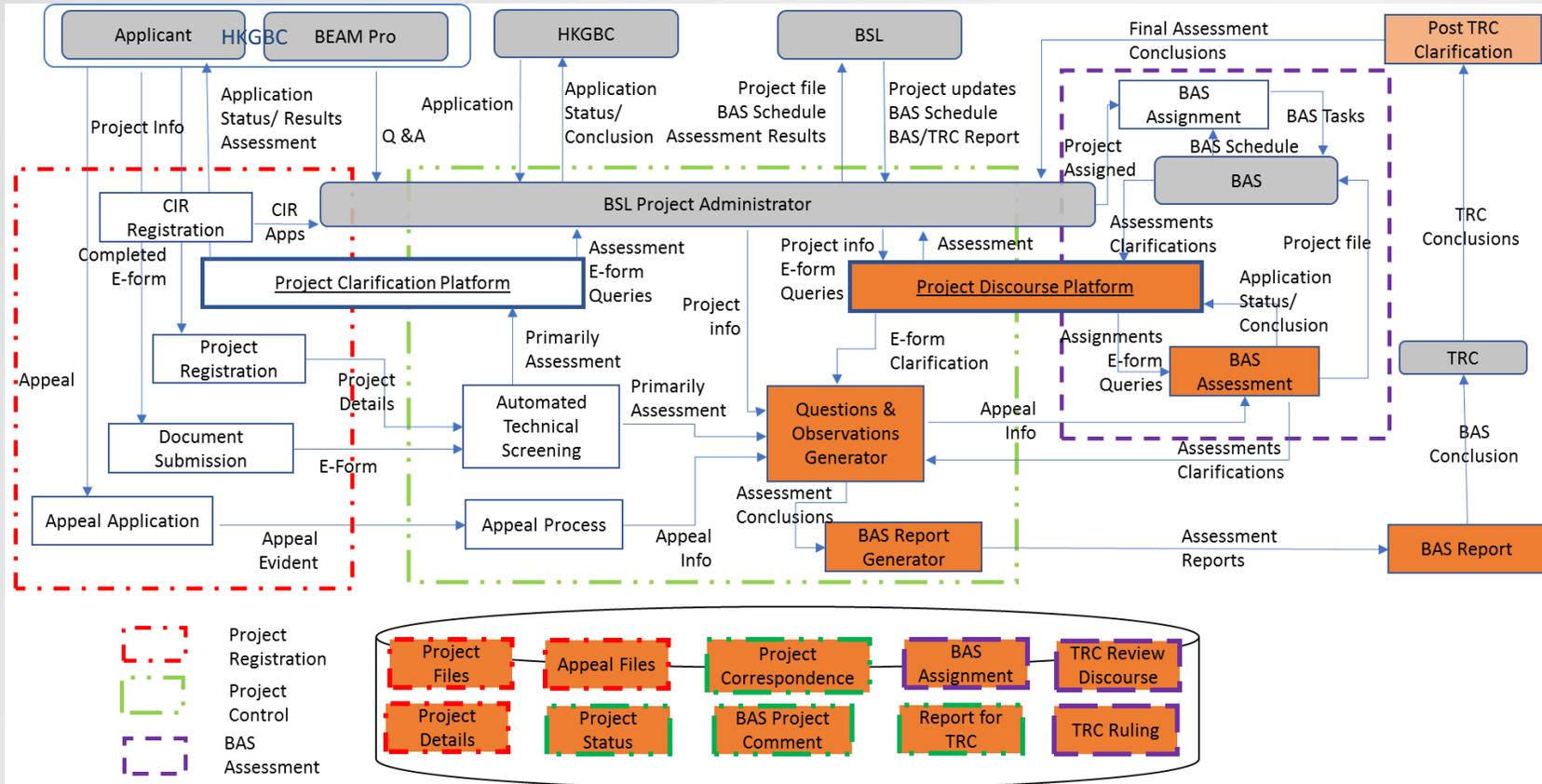
Scope of Work (Con't)

Figure 7: High-level view of the processes and data involved in Audit and Knowledge Data Dictionary

Deliverables

Deliverables

- The Provider shall be responsible for the **analysis, design, development, testing and maintenance** of the new System, and provide the **following report** as part of the deliverables:-

Deliverables	Contents
An Inception Report	Set out the details of the Assignment, including but not limited to, the alignment of underlining Assignment's objectives, goals, with methodology/project plan to be carried out, key milestones with deliverables, resource requirement, and details on key supporting staff mandated for the Assignment.
A System Analysis Report including: - an "as is" report and - a "future blueprint" report	Encompass current/future state of the BSL's business environment & processes - "as is" report encapsulating the assessment of the current view of the BSL's business and process, with recommendation on potential improvement opportunities of the current business - "future blueprint" report envisioning the future schematics of the BSL's business and process, supported by potential organizational changes and training needs
A Detailed Design Report	Highlight on outcome based on potential improvement and address the needs for integrity, consistency, effectiveness and efficiency of the BSL's operation.
Monthly Progress Reports	Highlight any potential impacts on the BSL organization, and risks thereof in association with the BSL during the course of implementation of new System

Deliverables (Con't)

Deliverables	Contents
A Project Plan	Specify project tasks and quality related tasks, implementation of the plan and assurance of the overall quality of the Assignment.
Briefing Sessions	Provide briefing sessions to the BSL based on the timing of their scheduled meetings to explain the progress of the Assignment, findings, and recommendations of the individual stages of the Assignment
A Test Scheme	Include all test cases and scenarios, detailing their methodology, plan and process, with resources required, for acceptance of the new System adhere to the end goals specified in the inception report.
An Acceptance Report	Detail the test results, with issues identified, and signoff by all stakeholders, and emphasize on how the user requirements and design of the future System are being addressed.
A final report	Provide highlight on the future improvement potential and support plan addressing the BSL's ongoing operational needs.

Note: Supplementary information or reports other than the deliverables stated above shall be prepared and delivered at such time upon requested by the BSL.

Brief Timeframe

Brief Timeframe

- The required work shall be commenced **within 2 weeks after the notification from the BSL** *or* **at any other time as agreed by the BSL** upon award of this Agreement.

- The service under this Agreement should be completed within 6 to 12 months after the commencement of the Assignment.

Submission

Submission

Assessment criteria

- Appreciation of the **key requirements** and **constraints/risks**;

- **Methodology**, **approach** and **strategy** to meet the requirements of the Assignment;

- **Previous relevant experience** with similar scale and requirements both in **Hong Kong and elsewhere**;

- **Qualification**, **knowledge**, **experience** and capacity of core personnel (inclusive of **sub-contractors** to be employed, **if any**) available for the project together with **CV**, and an **organization chart** of the project team.

Tentative Procurement Plan

Tentative Procurement Plan

- The Assignment is tentatively planned to commence in **Quarter 1, 2019**; and

- The tentative procurement plan may be as follows:

Description	Time
EOI	July 2018
EOI Evaluation	August 2018
Formal Tendering	October 2018
Tender Evaluation	November 2018
Tender Award	December 2018
Commencement of Assignment	January 2019

Reminder

Reminder

- The **BSL** should be entitled to the **ownership** of **cloud** service;

- **BIM compatibility** (See Appendix);

- **No fees offer;**

- For the avoidance of doubt, the **BSL shall _not_ be liable** and responsible for the **reimbursement** of **any cost incurred** by for the **preparation and submission of your EOI** to the BSL.

Reminder (Con't)

- The document shall be in a **maximum** of **20 A4 pages** and a **minimum font size** of **12 points**;

- You may make your submission in either electronic format **or** hard copy format.

- If you choose to make your submission in hard copy format, please submit **before 12:00 noon on Friday, 10 August 2018** ("the Closing Date") by submitting ONE copy in a sealed envelope according to the template as shown in **Annex B** of Invitation Letter. The envelope shall be placed in the BSL's tender box located at **1/F, Jockey Club Environmental Building, 77 Tat Chee Avenue, Kowloon Tong, Hong Kong SAR, China** for the attention of the Procurement Division of the BSL.

Reminder (Con't)

- If you choose to make your submission in electronic format, the documents for your proposal shall be prepared and submitted in accordance with **Annex C** of Invitation Letter.

- In the event of a Tropical Cyclone Warning Signal No. 8 or above is hoisted or a Black Rainstorm Warning signal is issued between 9 am and 12 noon on the Closing Date, the submission closing time will be postponed to 12 noon on the next working day.

Appendix

Appendix

Area for current compatibility and future exploration when conditions mature

- **Next generation e-form system** shall be taken into consideration of importing project data from **Building Information Modelling (BIM) technology**.

- **Such import capability** does ***NOT*** **contribute to the** *scope of work* **within the** *purview of current* **project**, **but** the System shall be designed and developed to **ascertain such BIM associated import gateway can be opened and considered**.

- The Provider is required to elaborate on how such functionality could be implemented in the *next phase* **of the System which is out of scope of** *current* **Assignment**.

- The System shall **exhibit** **compatibility with BIM** and incorporate features **allowing extension of acceptance of BIM related information** as requested by the BSL in future.

Questions & Answers

Thank you