Estimated Value of the Tender: Rs. 6,40,000
Tender No.: TISS/SIMHA/2023
Last Date for Submission: 08th November 2023

Request for Proposal

Cloud Telephonic Helpline Service Setup for SIMHA (TISS)

From 10th October 2023 to 31st March 2024
(Likely to be extended)

ONLY THROUGH ONLINE PURCHASE PORTAL OF TISS
(https://www.tenderwizard.com/TISS)

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Notice for Inviting Tenders (NIT)

About the Institute

The Tata Institute of Social Sciences (TISS) was established in 1936 as the Sir Dorabji Tata Graduate School of Social Work. In 1944, it was renamed as the Tata Institute of Social Sciences. The year 1964 was an important landmark in the history of the Institute, when it was declared Deemed to be aUniversity under Section 3 of the University Grants Commission Act (UGC), 1956.

Since its inception, the Vision of the TISS has been to be an institution of excellence in higher education that continually responds to changing social realities through the development and application of knowledge, towards creating a people-centered, ecologically sustainable and just society that promotes and protects dignity, equality, social justice and human rights for all.

About SIMHA-SBIF

The School Initiative for Mental Health Advocacy (SIMHA) is a mental health advocacy, research and capacity building initiative of the Tata Institute of Social Sciences, Mumbai, working towards creating mental health friendly educational institutions and schools across India. Through on-field research and multiple stakeholder interactions, SIMHA has established a contextually relevant framework for whole-school mental health practices for India, based on the World Health Organization's (WHO) whole-school mental health approach.

SIMHA envisions to establish sustainable mental health educational systems across educational boards and contexts in India. Embedded in the core values of integrity, collaboration, diversity, intersectionality, equity and social justice, SIMHA operates through a strengths-based approach to establish schools as communities of care for all stakeholders. SIMHA collaborates and works closely with educational institutions, public and private sector organisations in the field of education and schools across India.

Project Background

SIMHA, TISS works across 3 verticals:

- Capacity building – The faculty from School of Human Ecology is involved in envisioning and facilitating workshops, specialised trainings and other capacity-building initiatives for multiple school stakeholders, such as educators, school counsellors, parents and students.
- Research – Research is undertaken thoroughly to inform our work with the best-practices in the field of mental health and to generate contextually relevant research on mental health needs, challenges and best practices within school systems across India.
- Advocacy – The project aims to advocate for the mental health and well-being of children and adolescents through sensitisation, capacity building and collaboration with key stakeholders within and outside the school system.

Scope of work

As part of its continued effort to advocate for schools that promote the mental well-being of children and adolescents, SIMHA aims to set up a telephonic helpline to provide support, guidance, and resources to school stakeholders who have been a part of our training programmes. This telephonic helpline is not a crisis helpline. Instead, its focus lies on providing accurate referrals, resources, and connecting school leaders with organisations or mental health professionals who are already making great strides in this field within their respective regions.

The scope of the telephonic helpline is to serve the following purposes in the context of SIMHA's partners:

- To provide educational resources and strategies related to the concerns of school stakeholders.
- To assist in the successful implementation of school mental health initiatives.
- To establish an inclusive and comprehensive resource centre that facilitates a seamless connection between stakeholders.

Scope of Work & Key Deliverables:

1. Setting up a telephonic helpline: The agency should aid the process of setting up 1 product i.e. a cloud-based telephonic helpline.
2. Provision of 2 instances i.e. the product should be customized to provide the SIMHA team with 2 separate helpline numbers to be manned by 2 separate teams of counsellors.
3. Billing of invoices as well as data generation for call details (eg: call log, active talk time for agents, etc.) will be provided separately for the 2 separate helpline numbers.
4. Orienting 4-6 team members of SIMHA to the telephonic helpline interface by scheduling a training based on dates mutually agreed upon by the vendor and SIMHA.
5. Provision of support in setup process: The agency should provide manned telephonic as well as email support to SIMHA during the process of setting up the telephonic helpline.
6. Performing monthly health checks of the telephonic helpline system.
7. Provision of robust data protection and privacy policy protocols.

Cloud Telephony Service Feature Requirements

Must features:

1. Free incoming call charges (unless the number provided is toll-free)
2. Friendly software for up to 10 users
3. Manned Telephone Support
4. Monitored Email Support from vendor, if required
5. Remote assistance using a remote desktop and virtual private network where available
6. Planned or emergency onsite assistance

7. Monthly system health check
8. Call routing to mobile numbers
9. Professional IVR recordings
10. Record and retain calls on a secure cloud service
11. Call transfer between agents and to supervisor, if required
12. Report generation for calls

Desired Features:

- Project can choose helpline number
- Should provide Toll-free number for the helpline
- Mapping a toll-free number onto selected lines
- Being able to give dedicated lines and numbers to specific partners
- Giving callers the option of call-back requests
- Automated email reports
- SMS acknowledgements
- Past data visibility
- Integrate with the telephony system
- High level of customisation (as such products are mainly meant for customer relationship management but we have a different use case)

Project Completion Criteria

1. SIMHA, TISS approves and sign-off each of the Key Deliverables
2. The telephonic helpline is operational to receive calls and all agents are able to navigate the helpline interface with ease.

Essential qualification of the Agency:

- The agency should have a minimum experience of 5 years of developing technological solutions.
- Knowledge of the social development sector is desired.
- The agency should have relevant experience in developing solutions for mental health and should have professionals who understand the sensitivity of addressing mental health concerns.
- All claims cited by the agency should be adequately substantiated in the proposal.
- The agency should have sufficient resources to offer continuous technical support.

- The agency should have robust data protection and privacy guidelines and policies which include but are not limited to data confidentiality, restricted access to cloud data and no engagement with third parties to use or sell user data.

Technical Specifications of Required Cloud Telephony Service

SL	Feature	Feature Comment
1	Platform	Voice/Ticketing
2	V/T/V+T	V=Voice, T=Ticketing
3	Ticket logging options	C = Call, M = Mail, S = Social Media, T = Text SMS, CH = Chat
4	Outbound dialler	Soft dialler
5	Web Interface	View of inbound & outbound calls report based on real time for data analytics.
6	Live Call Dashboard	Track all ongoing calls and provide agent status data (eg: provide statistics/quantitative data of durations for login time, ready, stop, pause, confer, transfer, mute, hold, call, manual, preview, recordings of calls etc.)
7	Email Reports	Email reports can be automatically generated daily through IVR for admin review purpose
8	Welcome Greetings	A welcome sound can be played when the customers call- up on IVR number which create professional touch
9	Programmable Extensions	IVR consists of extensions to route calls to the concerned department or person without any manual intervention
10	Voicemail	It is for recording voice to leave messages in terms of ideas, suggestions and feedback from customers
11	Call Logs	It consists of calls details such as the phone number of caller, time, date, duration, status, etc. for creating database, tracking & monitoring agents
12	Call Recordings	The IVR records conversation on a cloud service for each call between agent and caller for quality & training purposes

13	Call Distribution	All the calls get distributed smartly through IVR to the mapped agents ensuring smooth call handling process
14	Call Forwarding	The calls, whether inbound or outbound, would be forwarded to the given numbers irrespective of any telecom operator.
15	Call conferencing	Multiple agents to join the same call, if needed
16	Multi-Language	IVR supports multi-language like English, Hindi or any regional language for good customer experience
17	CRM Integration	The IVR can be integrated with almost all popular CRM applications to intelligently handle inbound and outbound calls
18	SMS Acknowledgement/ Notification	Agent gets sms if any call is missed out
19	Multi-level IVR	Creating a multi-level IVR in order to help callers navigate to the correct person easily, without having to hear too many options in one go
20	After hours support	The IVR system redirects calls after office hours to the mapped phone number ensuring great customer experience
21	Call queue	During the time the client is on queue while all agents are busy, you can play marketing messages
22	Caller-based routing	In case of multiple offices, the calls can be routed to the agents at respective locations once the location of the caller is identified by the IVR system
23	Number of agents to receive calls	Multiple channels to receive multiple calls at the same time
24	In-call transfer	The IVR system enables an agent to transfer the active or current call to some other telephone number or agent
25	Unified management	Single pane for management

26	Custom analytics report	Monitor the activity of your hosted contact centre and draw business insights with a customizable daily and periodic dashboard of call performance and trends.
27	Call Whispering, Barging & conferencing	Hear calls in real-time, share vital inputs with your agent on an ongoing call remotely and take over a conversation
28	Agent & Supervisor Login	Separate login for Agents & Supervisor, so they can perform activities as per their authority.
29	Waiting Position Announcement	Callers would have their current position announced for inbound calls.
30	Agent Call Popup	Agents would have a pop-up on screen with the client's information, available with the database
31	Follow-up/Task Reminders	Pop-up messages for agent to remind of an activity/action
32	In-built toll-free helpline number	Helpline number is provided by the vendor so no cost of liaising with third-party is incurred to setup toll-free helpline number

Proposal Format

The goal of this Request for Proposal (RFP) is to determine if bidding agencies meet the functional and technical needs of SIMHA, TISS. Please feel free to submit any additional information you deem appropriate for this project.

Any CD/flash drive and/or user documentation submitted with your proposal will be returned upon written request.

The proposal is required to be in two primary sections, namely the Technical Proposal and the Financial Proposal. Rules and requirements of each section are described below:

Technical Proposal:
Interested agencies will submit **a technical proposal** including the following:

Institution Overview

1. Provide a brief institution history, years in service, number of employees and office locations.

2. List similar projects undertaken, and services provided through them.
3. List any awards or industry recognitions if any.
4. Competitive advantage of the organization to deliver on this project.
5. Personnel and their credentials who will be allocated for this project.

Please provide **three references of organizations that have utilized your custom services**. Include the contact name, title, company name, address, phone number and email address for each reference.

Project Planning and Monitoring

- Describe a broad timeline for the design, development and implementation of the platform and future troubleshooting
- Describe processes in place for reviews, change management and risk management.
- Availability of features and technical specifications and requirements requested above

Expected Timelines

For the setup of the telephonic helpline, we anticipate 1 month from the time of award of contract. Therefore, parties are requested to plan accordingly.

Procurement Details

TISS invites Online bids under single stage, two envelope systems from eligible bidders for thefol-lowing procurement or services:

Details of tender(s) i.e. Estimated Cost, EMD, Tender Fees, Time limit etc. is available on **http://www.tiss.edu/careers-tenders/ and https://www.tenderwizard.com/TISS**

PROCUREMENT / SERVICES for Cloud Telephonic Helpline Service Setup for SIMHA, TISS Details of tender(s) i.e. Estimated Cost, EMD, Tender Fees, Time limit etc. is available on **http://www.tiss.edu/careers-tenders/ andhttps://www.tenderwizard.com/TISS**

Tender documents may be downloaded from the TISS e-Procurement Portal https://tenderwizards.com/TISS or TISS website www.tiss.edu as per the schedule as given in CRITICAL DATE SHEET as under:

Schedule of Events/CRITICAL DATE SHEET

Published Date & Time Bid Document Download Start Date & Time	18.10.2023 (11.00 hrs)
Pre-bid meeting	26.10.2023 (11.00 hrs)
Last Date for Submission (Online)	08.11.2023 (13.00 hrs)
Bid Opening Date & Time (Technical)	09.11.2023 (16.00 hrs)
Cost Bid Opening Date & Time	012.11.2023 (16.00 hrs)

Please note that the Institute will place the order to the supplier/vendor/agency, who stands the lowest considering overall cost of the items (Total Cost of the Tender based on the listed items).

For further details please visit <www.tiss.edu> or <https://www.tenderwizard.com/TISS>. Tender documents can be downloaded from the Website of www.tiss.edu or https://www.tenderwizard.com/TISS. Tenders received without tender document fee and EMD will be rejected.

REGISTRAR

Place: Mumbai

Technical & Financial Bid Opening Authority:

1. Dr. Chetna Duggal, Project Director, SIMHA (Indenter)
2. Mr. Srinivas Kota, Deputy Registrar, Finance & Accounts Division
3. Mr. Chetram Singh, Internal Audit Officer
4. Mr. Sivakumar, Systems Manager & Chairperson, Computer Centre
5. Ms. Rashida Begum, Consultant, Purchase & Stores Section

Financial Proposal

Interested agencies will also be required to submit a financial proposal that provides a breakdown of project costs aligned with the proposed implementation and technical solution. The financial proposal should include hardware, software and installation costs. If there are additional costs that may be incurred in the following years, the company should mention so as per the cost bid performa format provided.

TECHNICAL BID PERFORMA

Note: ***This form is also available in EXCEL Format for online submission (Mandatory)***

1.	Name of the Firm/Company/Agency (Attach a copy of registration)		
2.	Name of the Director/Proprietor/Head etc.		
3.	Address of the Registered office, Local office in Hyderabad		
4.	Whether ISO certified. If so enclose the copy of relevant certificate.		
5.	**Contact Details:** **Phone/Fax/Mobile Nos.** **Email** **Website, if any**		
6.	PAN No./TIN (Attach a copy)		
7.	GST Registration No. (Attach a copy)		
8.	Labor Commission Registration No. (Attach a copy)		
9.	EPF Registration No. (Attach a copy)		
10.	ESI registration No. (Attach a copy)		
11.	Financial Turnover in last Three FYs (in lakhs) Attach a copy of Audited statement of each)		
	(a) FY: 2018-19		
	(b) FY: 2019-20		
	(c) FY:2020 -21		
	Audited financial statements or financial statement showing turnover duly signed by a chartered Accountant are to be enclosed		
12.	List of similar contracts with reputed institutes/organizations/PSUs/University etc., (Attach a copy of work order/completion certificate in each case)		
	Organization	Contract Value (Annual)	Duration
	1		
	2		
	3		
	4		
	5		
13.	EMD Details (Enclose the Online Receipt with Technical Bid)		
14	Bank Details		Cancelled Cheque to be uploaded..

Note: This proforma after filling up details has to be submitted with technical bid along with all supporting attachments. Please use more than one sheets to furnish the above information if required. Copies of supporting documents attached must be serially numbered from 1 to13.

Signature & Seal of the Bidder

Selection Criteria

The scoring guide for technical assessment is provided below:

SL	Criteria	Points
1	Prior experience and work samples, including client references • No Experience – 0 Points • 2+ years of experience of stable cloud set-up service with client reference- 5 Points • 2+ years of Experience of stable cloud set up services in Humanities sector with client reference – 5 and above	10
2	Quality of Platform visually, technically, and Value-Added Services and Scope for Customization. 1. Customization features as per the need of the service provider - 5 points 2. User-friendly platform which is easy to understand - 5 points 3. Dashboard facilities with real-time analysis of performance and downloadable reports – 10 points 4. Provision of in-built toll-free numbers - 20 points	40
3	Sophistication of caller-engagement ideas 1. IVR facility for the night mode, backend support with IVR prompts for non-availability of the service, feedback mechanism- 5 points 2. Outbound call facility – 5 Points 3. Customization in the Indian Regional language – 5 points	15
4	Costs proposed	10
5	Plan of Action regarding Platform development and setting up (including policies on privacy of user data and protocols to ensure data protection)	10
6	Competencies of Human Resources assigned to the project 1. Online and remote support within 2 hours – 5 points 2. Offline support within 2 days - 5 points 3. Support offered within 24 hours of receiving complaint of data breach - 5	15
	Total	**100**

Weightage: 70

Bidding Process and Selection of Agency

The following steps will be undertaken in conducting the bidding process and selection of an appropriate Agency:

1. SIMHA, TISS will constitute a committee to review proposals. Evaluation criteria and a point - based scoring system has been developed and included in this RFP.
2. Pre-bid meeting will include demonstration of the setup provided by the vendor/agency.
3. Upon receipt of agency proposals on the due date, review committee members will independently review and score all proposals from the technical perspective only.
4. The committee will then meet and collective scores based on the individual assessments will be calculated.
5. The short-listed organizations may be asked to make a presentation to the assessment panel constituted by TISS Agencies and/or their representatives will have to make their own arrangements (travel, boarding/lodging) to make the presentation to the assessment panel constituted by TISS. Presentation can be done online or offline. Offline presentations are preferred.
6. Financial bids of only those agencies scoring 70% or more on the technical assessment will be opened. The financial proposals of the agencies that do not qualify the technical review will be deemed unqualified.
7. Only the shortlisted agency/ies will be notified.

Logistics and the due date for submission of proposals

Logistics and the due date for submission of proposals: All enquiries regarding the RFP, subsequent proposals and the bidding process to be sent to the email id simha.tiss.2022@gmail.com and with CC to chetna.d@tiss.edu and ipsita.malaviya@tiss.edu with the subject line "Setting up helpline for SIMHA" only. Emails without the correct subject line will not be looked at.

The bidding process will occur through the TenderWizard portal <www.tenderwizard.com/TISS >. Directions for the same are provided separately.

Other Financial Implications:

		Percentage	Amount
1	Earnest Money Deposit	2% of Estimated Cost	Rs. 12,800
2	Performance Bank Guarantee	3% of Contract Value	

EMD/ Bid Security of 2% of Estimated Cost and 3% of Contract Value respectively .

1. **EMD & BID SECURITY:-**

   EMDs **will be refunded within one month of completion of evaluation** of bids (both technical and financial) for vendors other than the vendor selected for awarding the contract. Interest will not be paid on the EMD.

2. **Bid Security** (i) To safeguard against a bidder's withdrawing or altering its bid during the bid validity period in the case of advertised or limited tender enquiry, Bid Security (also known as Earnest Money) is to be obtained from the bidders except Micro and Small Enterprises (MSEs) as defined in MSE Pro- curement Policy issued by Department of Micro, Small and Medium Enterprises (MSME) or are regis- tered with the Central Purchase Organisation or the concerned Ministry or Department. The bidders should be asked to furnish bid security along with their bids.

   The Bid Security to be valid for the period of 45 days beyond the final bid validity @ 3% of Contract Value.

3. **Performance Security** may be furnished in the form of an Account Payee Demand Draft, Fixed De- posit Receipt from a Commercial bank, Bank Guarantee from a Commercial bank or online payment inan acceptable form safeguarding the purchaser's interest in all respects.

   Performance Security will remain valid for a period of sixty days beyond the date of completion of all contractual obligations of the supplier including warranty obligations.

   Bid security will be refunded to the successful bidder on receipt of Performance Security.

4. **Payment Mode:** Payment of the hardware, software and installation of the telephonic helpline will be completed after completion of said setup process of the helpline and satisfaction of the SIMHA team. Any additional charges for the maintenance/operation of the helpline to be covered based on

a mutually negotiated payment timeline (eg: monthly, quarterly, etc.) between the vendor and SIMHA.

5. **Financial Bid Validity:** The financial bids will be valid for 60 days from the date of the opening of the bid.
6. **Site/Location of Setup:** The setup of the helpline will be undertaken either in a remote format (i.e. no physical setup is required if the helpline is based on a cloud service) or a physical site, which would be the Pota Cabin allotted to the SIMHA project team in Naoroji Campus, Tata Institute of Social Sciences, Mumbai. The setup of the helpline is preferred to be cloud-based to avoid physical setup process but can be negotiated based on the requirements of the vendor and the SIMHA team mutually.

COST BID PERFORMA

Weightage: - 30

SL	Description of Service (along with assumptions)	GST%	Indicative price (Indian Rupees) Approx.
1	Setting up cloud-based telephonic helpline (hardware, software and installation included)	18%	
2	Additional operational/maintenance costs, if any		
	Total Cost (INR)		

* Helpline to be operational for 6 months and cost per month calculated on a pro-rata basis; extension of 3 months contingent on external funding

The aforesaid indicative price is inclusive of GST @ 18%

Note: *Please note that no indirect costs should be included in the proposal*

Payment terms: Payment to be made on recurring basis contingent on completion of activities certified by SIMHA, TISS.

DOCUMENTS TO BE UPLOADED & HARD COPIES TO BE SUBMITTED CHECK-LIST:

1. Shop & Establishment / Certificate of Registration
2. Manpower Strength
3. No. of Branches (Different Geographical Areas)
4. GST Registration Certificate
5. SSI/MSME Registration/ Udyog Aadhar Registration Certificate
6. Copy of PAN Card
7. List of Clients (Govt. & Non-Govt)
8. List of Products/Goods & Services
9. Three Consecutive Year's Audited Balance Sheet & Income Tax Return/Annual Turnover
10. Photo-copies of any two recent MOUs or Purchase Orders with similar organizations
11. Bank Details (Cancelled Cheque)
12. Copies of any two Offer Letters issued by any organization of similar tenders

Also hard copies of the following documents are to be submitted to the Section Officer, Purchase & Stores Section, V.N. Purav Marg, Deonar, Mumbai-400 088.

Bidder's Declaration

I, the undersigned _____ Son/Daughter of _____ Shri_____Proprietor / Partner/Director/ Authorized Signatory of M/s_____am competent to sign this declaration and execute this tender document.

I have carefully read and understood all terms and conditions of the tender and hereby convey my acceptance of the same.

I /We _____ (Tenderer) hereby also declare that the Firm / agency namely M/s._____has not had any pending criminal cases against Partners / Proprietor / Others and we are not blacklisted by any Government Agency for any fraudulent practices so far.

The information/documents furnished along with the above application are true and authentic to the best of my knowledge and belief.

I/We am/are well aware of the fact that furnishing of any false information/fabricated documents would lead to rejection of my tender at any stage besides liabilities towards prosecution under appropriate law.

Date: Signature of the Authorized Person
(With Seal / Stamp)

Place:

Name of the Person :

Mobile No: :

UID No: :

Note: This declaration must be submitted along with technical bid. Above mentioned form - Vendors need to fill up the form with stamp and singed on letter head and same should be uploaded online also.