



# **TERMS OF REFERENCE (TOR)**

**1199 CRM**

**Public Service Delivery Division,**

**Cabinet Secretariat**

## 1. Background and Context

The Public Services Delivery Division under the Prime Minister's Office (PMO) is responsible for spearheading all initiatives relating to public service delivery and carry out process streamlining in order to improve public service delivery and reduce the turn-around time of public services.

The 1199 Call Center serves as the crucial first point of contact for all citizens seeking assistance with G2C services. As the primary support channel, its efficiency directly impacts public satisfaction and the overall success of government service delivery. While the center has implemented a robust telephone system, its operational effectiveness can be significantly enhanced through the strategic deployment of a comprehensive Customer Relationship Management (CRM) system. A well-designed CRM will contribute to improved agent productivity, enhanced citizen service and a more responsive and effective service delivery model.

## 2. Objectives

The objectives of the assignment are:

1. To bring about operational efficiency by improving the data collection and entry
2. Improve the coordination between agents and supervisor
3. A data driven decision making

## 3. Scope of the Services

### 3.1 Functional Requirement Document

Refer to ***Business Requirement Document*** for detailed information.

### 3.2 Non-functional Requirement Document

Refer to ***Non-functional Requirement Document*** for detailed information.

## 4. Key Responsibilities

The selected consultancy firm shall carry out the following activities and responsibilities:

- Engage with stakeholders to review detailed business requirements.
- Identify inefficiencies and propose enhancements to business processes.
- Prepare detailed documentation, including requirements, process flows, use cases, functional and non-functional specifications.
- Develop software that supports the business requirements.
- Facilitate effective communication among stakeholders, ensuring clarity and mutual understanding.
- Support the organization in managing changes related to business processes and systems.
- Provide training to end users and offer ongoing support after implementation.
- Maintain coding standards.
- Test the system for bugs, browser and device compatibility, and security vulnerabilities.
- Document every process for future reference and maintenance purposes.
- Deploy and test on the testing server, staging server, and production server on GDC.

## 5. Technical Terms and Condition

Refer to *Non-functional Requirement Document* for Development platform, Technology and System Architecture.

### 5.1 Security Features

#### 5.1.1 System Security

##### 5.1.1.1 Confidentiality

The consultancy firms should maintain the confidentiality of the system.

The following are the measures that consultancy firm should implement:

- **Access Controls:** Implement strong access control mechanisms, such as Role-Based Access Control (RBAC) and Mandatory

Access Control (MAC), restrict access to sensitive data to authorized users only.

- **Authorization:** Strict authorization protocols should be implemented to ensure that users are who they claim to be and have permission to access the resources they request.
- **Data Masking:** Masking sensitive data fields in databases and applications to prevent unauthorized access.

#### 5.1.1.2 Integrity

The consultancy firms should uphold integrity to ensure that the information in the system remains accurate, consistent, and unaltered.

The following are the measures that consultancy firms should implement:

- **Audit Logs:** Maintaining detailed logs of data access and changes to track and review modifications.
- **Version Control:** Implementing version control in the GitLab to track changes and maintain data integrity over time.

#### 5.1.1.3 Availability

The consultancy firms should maintain the availability so that the information and resources are accessible to authorized users when needed.

Following is some of the measure that the consultancy firms should implement:

- **Load Balancing:** Using load balancing to distribute traffic across multiple servers to prevent any single server from becoming a point of failure.
- **DDoS Protection:** Implementing measures to protect against Distributed Denial of Service (DDoS) attacks, which can overwhelm and disable services.

## 5.2 Warranty, Support & Maintenance

- The consultancy firm must provide **free support for a period of 1 year** from the time of signing of all quality assurance testing of the software between system owner and consultancy firm (Warranty support).
- During this period, the vendor is responsible for following technical support:
  - Update server patches
  - Fix bugs
  - Make some minor changes within development scope.
- The consultancy firm should maintain the application/software version during the support and the maintenance period.

### **5.3 Ownership of Source Code and Other Intellectual Property**

- Intellectual Property associated with the system; the Public Service Delivery Division, Cabinet Secretariat shall have full rights over these resources.
- The entire software component developed as part of this assignment shall be the sole property of the Public Service Delivery Division, Cabinet Secretariat.
- The selected vendor should conduct thorough knowledge transfer sessions for DSD and DSOM staff, including code walkthroughs and documentation as per the GovTech Knowledge transfer standard.
- The Public Service Delivery Division, Cabinet Secretariat will be the rightful owner of the Source Code.

### **5.4 Use of Source Code Management Tools**

- The consultancy firm will be provided with the GitLab account.
- The selected consultancy will be provided access to the shared project repository..
- The consultancy firm should upload the latest source code along with the database dump in the GitLab (*The source code in the GitLab should be updated even after the minor bug fix.*)

### **5.5 Time Schedule and Deliverables**

This is a time-bound project and all the development work and testing have to be completed **66 days** from signing the contract.

(D represents the date of contract signing. W represents duration in weeks)

<b>Sl. No</b>	<b>Activities</b>	<b>Schedule (Weeks after signing)</b>	<b>Deliverable</b>
1	Functional and Non-functional Requirement Document presentation by Govtech.	D + 1 Week	Submit SRS to DSD
2	Develop SDD (System Design Document) by Vendor.		
3	User and master management	D + 2 Week	All the master setting should be workable (developed and deployed)
4	Call activities and email	D + 3 week	Complete system development, deployed and UAT
5	FQA/Information	D + 4 week	Complete system development, deployed and UAT
6	Tasks, G2C and notification	D + 5 week	Complete system development, deployed and UAT

7	data migration	D + 6 week	Complete system development, deployed and UAT
8	Dashboard and Reports	D + 8 week	Complete system development, deployed and UAT, moving to production
9	TOT and Document Submission	D + 9 week + 6 days	UAT, TOT and submission of documentation and source code

*\*\*\*After the first demo, a QA server along with the GitLab account will be provided and the consultancy firms should deploy the presented services /module for the testing and also upload it in the GitLab.*

*\*\*\* Consultancy firms should deploy within 3 working days after the server has been provided.*

*\*\*\* The Bug Reporting sheet will be shared with the consultancy firm to check and fix the bug reported by the System Owner.*

*\*\*\* The next demo should address the bugs from the previous demo (Reported on the shared sheet).*

*\*\*\* The schedule date for the demo is subjected to change however it should not exceed the project complete date.*

*\*\*\* Test case (what should be tested in that Service) should be provided by the consultancy firm right after the demo.*

## **5.6 Document Submission**

- **User Manuals:** Provide detailed user manuals with guides, screenshots, and troubleshooting sections.
- **Technical Documentation:** Include in-depth technical documentation covering architecture, APIs, and configuration.
  - Configuration files
    - Deployment configuration (both ios, android and web)
    - Pre and post configuration files.
    - Backup configuration files (Both application and database)
- **System Design Documentation:** SDD documents including detailed UI/UX wireframe, functional and non-functional requirements, a software user manual, a business process flow diagram, and information on software/package versions, technology stacks, database designs, hosting details, and deployment.
- **Process Documentation:** Outline development, deployment, maintenance, and support processes.
- **Change Logs:** Maintain detailed logs for each release, documenting features and fixes.



- **Training Materials:** Supply training materials, including tutorials and training schedules.
- **Version Control:** Ensure all documentation is version-controlled with access to previous versions.
- **Bug resolution documentation:** Selected firms should maintain details of currently fixed bugs and frequently asked questions from business users.
- **Troubleshooting guide:** Required to submit troubleshooting guides for the applications for fast service delivery.

## 5.7 Reporting

The consultancy firm will directly report to the “Chief (DSD), GovTech Agency” and “Chief Program Officer, Public Service Delivery Division, Cabinet Secretariat” and they will be the final owner of the developed system, data, consultations records, etc., and all documents generated as part of the consultancy.

## 5.8 Progress and Milestone Reporting

The consultancy firms should update the progress report based on the work plan that has been endorsed by the system owner after approval of BRD.

## 5.9 Patent and Copyright

- The Vendor represents that the solution or any product/Component, supplied by the Vendor does not infringe any patents and copyright. If, however, a third-party claim that the solution or any product/component thereunder, supplied by the Vendor under this Contract, infringes a patent or copyright (“IP Claim”), the Vendor shall defend the Client against the IP Claim at the Vendor’s expense and pay all costs, damages and legal fees that a court finally awards.
- If the vendor determines that no alternative is reasonably available, and the client agrees to return the Product/Component/Solution to the Vendor on the Vendor’s written request, an appropriate compensation has to be proposed and be acceptable to the client.

- The vendor has and will have no obligation to the client regarding any “IP Claim” based on:
  - The Client’s modification of a Product/Component under the solution unilaterally;
  - Use of the program in other than its specified operating environment:
  - The combination, operating, or use of a product/Component under the solution with any other product, program, data, or apparatus has not been envisaged in this contract and such product, program, data or apparatus is solely responsible for such infringement.

### 5.10 Termination of Work

The contract shall be terminated if the selected consultant breaches any of the terms and conditions stipulated under the contract.

In the event that the contract is terminated, the consultant shall be prohibited from participating in the tendering process for system development for one year.

## 6. Tender Evaluation

### 6.1 Eligibility

Participating freelancers or tech startups should be bhutanese nationals.

### 6.2 Tender Evaluation Criteria

Sl. No	Specifications from the Proposal (100)	Score
1	<b>Technical Expertise</b>	<b>30</b>
	<b>Relevant skills</b> - Proficiency in Programming Languages & Frameworks, Software Architecture & Design, API Development & Integration, Security & Compliance, Cloud & Infrastructure Management. (Attache certifications)	15

	<b>Past experience</b> - Past projects in Previous CRM or Call Center Projects, Industry Experience, Project Complexity, Experience with Agile & DevOps. (Attach CV and certificates)	10
	<b>Portfolio quality</b> - Demonstrate User Experience (UX) & Interface Design, Performance & Scalability, Security Measures Implemented and Code Quality & Maintainability in previous projects. (Link to previous projects and code samples or GitHub repositories if available)	5
<b>2</b>	<b>Project Approach &amp; Methodology</b>	<b>25</b>
	<b>Proposal Clarity</b> - Is the proposal well-structured, detailed, and easy to understand? Does it clearly explain the approach, technologies, and deliverables?	5
	<b>Development Plan &amp; Methodology</b> - Does it outline phases (requirement gathering, design, development, testing, deployment)? Are they using Agile, Scrum, or Waterfall methodologies for development? Are key milestones and deliverables clearly defined?	10
	<b>Timelines &amp; Milestones</b> - Is the timeline realistic and achievable? Does it include key phases like design, development, testing, and deployment? Are buffer times allocated for unforeseen challenges? (work Plan)	5
	<b>Risk Management Strategies</b> - Have they identified potential risks (technical issues, delays, security concerns, etc.)? Are there mitigation strategies in place (backup plans, contingency measures)? How do they handle scope creep, performance issues, and security threats?.	5
<b>3</b>	<b>Team Capability &amp; Resource Availability</b>	<b>15</b>
	<p><b>Freelancers: Can They Manage All Aspects Independently?</b></p> <ul style="list-style-type: none"> <li>Do they have full-stack development expertise (backend, frontend, database, API, security, cloud hosting)?</li> <li>Can they handle UI/UX design, testing, and deployment without external support?</li> <li>Do they have a network of collaborators (e.g., designers, DevOps engineers) for specialized tasks?</li> <li>How do they manage workload and multiple projects to ensure timely delivery?</li> </ul>	15
	<p><b>Startups: Does the Team Have the Right Mix of Expertise?</b></p> <ul style="list-style-type: none"> <li>Does the startup have a balanced team (developers, project managers, testers, DevOps, UI/UX designers)?</li> </ul>	15

	<ul style="list-style-type: none"> <li>• Are the team members experienced in CRM, customer support solutions, and system integration?</li> <li>• Do they have a dedicated project manager to ensure smooth coordination?</li> <li>• How many projects are they currently handling, and do they have adequate resources to focus on this CRM project?</li> </ul>	
<b>4</b>	<b>Scalability &amp; Support</b>	<b>10</b>
	<p><b>Freelancers: Long-Term Availability &amp; Risk Mitigation</b></p> <ul style="list-style-type: none"> <li>• Ongoing Maintenance &amp; Support: Can they commit to long-term system maintenance, bug fixes, and feature enhancements post-deployment?</li> <li>• Project Continuity Risks: What measures are in place if they become unavailable due to workload, personal commitments, or relocation?</li> <li>• Knowledge Transfer &amp; Documentation: Do they provide detailed system documentation to facilitate a smooth handover if required?</li> <li>• Backup Resources: Do they have a network of trusted collaborators or subcontractors who can step in when needed?</li> </ul>	10
	<p><b>Startups: Post-Deployment Support &amp; Scalability</b></p> <ul style="list-style-type: none"> <li>• Technical Support &amp; Upgrades: Do they offer structured post-development maintenance, security updates, and performance monitoring?</li> <li>• Scalability &amp; Future Expansion: Can they enhance the CRM system as call center demands grow, including AI chatbots, analytics, and third-party integrations?</li> <li>• Financial &amp; Operational Stability: Is the startup financially sustainable, ensuring long-term availability and reliability of services?</li> <li>• Service Level Agreements (SLAs): Do they define clear response times, resolution commitments, and service continuity guarantees?</li> </ul>	10
<b>4</b>	<b>Past Performance &amp; References</b>	<b>20</b>
	<b>Client Testimonials &amp; Reviews</b> - Client reviews and recurring clients indicate reliability. Freelancers should have ratings on platforms like Upwork, while startups should provide testimonials.	5
	<b>Past Project Success</b> - Past project success will be measured by experience in CRM, call centers, or government projects, timely delivery within budget, and ability to handle complex system integrations.	5
	<b>Reliability &amp; Professionalism</b> - Reliability and professionalism are shown through clear communication, realistic project estimates, and a strong track record of completing projects without dropping them midway.	5

	<b>Industry Reputation &amp; Recognition</b> - Industry reputation is reflected in awards, certifications, and client or expert recommendations, showcasing credibility and expertise.	5
	<b>Total</b>	<b>100</b>

**Technical Evaluation:** The vendor must achieve a minimum technical score of 70% to qualify.

Technical Proposal Weightage = 80%, Financial Proposal = 20%