INVITATION TO TENDER (ITT) FOR PROVIDING UK-MED’S LEARNING MANAGEMENT SYSTEM (LMS)

1. UK-Med invites your organisation, along with others, to offer a tender for provision of UK-Med’s Learning Management System (LMS) to the specification outlined in the attached documents. The successful bidder will be awarded a contract to supply for an initial period of 1 year with the option to extend on a plus 1 basis for a further 4 years, which will be renewed automatically unless terminated by either party giving the other at least 3 months written notice.

Enclosed are:

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All documents will be made available on [https://www.uk-med.org/tender-opportunities/](https://www.uk-med.org/tender-opportunities/)
2. Please read the instructions on the tendering procedures carefully. Failure to comply with these instructions may invalidate your tender.

3. Your tender should be emailed to procurement@uk-med.org no later 9am, 2\textsuperscript{nd} June 2023. All parts of your tender application must arrive by the deadline stated. Late tenders will not be considered.

4. This requirement is being procured using the Open Procedure. The tender is a two-stage process where your response to the Invitation to Tender is evaluated simultaneously against both the Selection Criteria and Award Criteria in Stage 1, with the highest scoring suppliers invited to give presentations for Stage 2.

5. All bidders will be advised on 12\textsuperscript{th} June 2023 whether they have been shortlisted for further demonstration of their product (Stage 2).

6. If you have any questions about the tendering procedure, please contact procurement@uk-med.org by 9am GMT on 12\textsuperscript{th} May 2023. We will endeavour to answer all questions by 9am 19\textsuperscript{th} May 2023 as outlined in Document 1 of this tender and will post anonymised answers on https://www.uk-med.org/tender-opportunities/

We look forward to your response.

Yours sincerely,

UK-Med
DOCUMENT 1

INSTRUCTIONS AND INFORMATION ON TENDERING PROCEDURES

Introduction

1. These instructions are designed to ensure that all tenders are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified. Please contact UK-Med by email at procurement@uk-med.org, if you have any questions or clarifications as to what is required in the tender application or if you have any difficulty providing the information requested. Please be advised that pre-tender negotiations are not allowed.

2. Bidders should ensure they have read and fully understood the guidance set out in this document before submitting a tender.

Timeframe

3. This time frame is provisional, UK-Med will do our best to follow this timetable. Any substantial changes will be updated on https://www.uk-med.org/tender-opportunities/ and/or via email.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tender publication date</td>
<td>01/05/23</td>
</tr>
<tr>
<td>Last date for submission of questions from suppliers (Only accepted via <a href="mailto:procurement@uk-med.org">procurement@uk-med.org</a>)</td>
<td>12/05/23</td>
</tr>
<tr>
<td>Deadline for UK-Med to respond to supplier questions</td>
<td>19/05/23</td>
</tr>
<tr>
<td>Submission deadline for electronic bids to <a href="mailto:procurement@uk-med.org">procurement@uk-med.org</a></td>
<td>02/06/23</td>
</tr>
<tr>
<td>Stage 1 Evaluation of bids</td>
<td>wc 05/06/23</td>
</tr>
<tr>
<td>Shortlisted Suppliers confirmed (max x3) and unsuccessful bidders informed</td>
<td>12/06/23</td>
</tr>
<tr>
<td>Stage 2 – Demonstrations by shortlisted Suppliers</td>
<td>wc 26/06/23</td>
</tr>
<tr>
<td>Contract award decision</td>
<td>wc 10/06/23</td>
</tr>
<tr>
<td>Contract commences on contract signing by both parties</td>
<td>tbc</td>
</tr>
</tbody>
</table>
Tendering process

4. You are invited to tender to provide UK-Med’s Learning Management system for a 5-year period.

5. The tender process will be conducted in a manner that ensures bids are evaluated fairly to ascertain the tenders that deliver greatest value for UK-Med.

Incomplete Tender

6. Tenders may be rejected if the information asked for in this documentation is not provided at the time of tendering.

Queries

7. Questions relating to any aspect of the tender process should be submitted, by e-mail to procurement@uk-med.org by 9am, 12th May 2023. UK-Med will aim to post responses to questions by 9am, 19th May 2023 and bidders should regularly check https://www.uk-med.org/tender-opportunities/

Returning Tenders

8. All tenders must be received from bidders by 9am GMT on 2nd June 2023. UK-Med will only accept submissions from bidders by email to the following address: procurement@uk-med.org

Please note that there is a size limit of 20MB on emails sent to this address. Your bid will not be received if it exceeds this limit. All documents should be in a format readable by Microsoft Office or Adobe Suite.

Format for completed tenders

9. Bidders should include the following documents with their tender as detailed in Document 3 below;

• Cost Proposal and Breakdown
No other documentation submitted will be assessed by the tender committee.

Receipt of Tenders

10. Tenders will be received up to the time and date stated in this invitation to tender. Those received before the due date will be retained unopened until then. It is the responsibility of the tenderer to ensure that their tender is delivered not later than the appointed time.

Tender Clarification Meetings

11. UK-Med may need to clarify certain issues that arise from posting the tender. We may therefore invite tenderers to a clarification meeting to clarify aspects of their tender submission.

Acceptance of Tenders

12. By issuing this invitation UK-Med is not bound in any way and does not have to accept any tender. UK-Med also reserves the right to accept a portion of any tender unless the tenderer expressly stipulates otherwise in their bid.

Inducements

13. Offering an inducement of any kind in relation to obtaining this or any other contract with UK-Med will immediately disqualify your tender from being considered.

Confidentiality of Tenders

14. Please note the following requirements. You must not:
• Tell anyone else what your tender price is or will be before the time limit for delivery of tenders.

• Try to obtain any information about anyone else's tender or proposed tender before the time limit for delivery of tenders.

• Make any arrangements with another organisation about whether or not they should tender, or about their or your tender price.

Failure to comply with these conditions may disqualify your tender.

Costs and Expenses

15. You will not be entitled to claim from UK-Med any costs or expenses, which you may incur in preparing your tender whether or not your tender is successful.

Debriefing

16. Following the award of contract, debriefing will be available to unsuccessful bidders on request.

Tender Period

17. UK-Med requires tenders to remain valid for a period of 6 months.

Legal Compliance

18. In putting together their tenders, tenderers should adhere to all appropriate legislative requirements.

Conclusion

19. Whilst every endeavour has been made to give tenderers an accurate description of the UK-Meds requirement, tenders are encouraged to make their own assessment and propose their own solutions to the challenges posed by the specification, relating both to the methods and resources needed to meet those requirements. This applies both during the writing of the tender process and, if successful, after being awarded the contract.
DETAILS OF THE WORK

Background

UK-Med is a medical aid charity. Born of the NHS, we’re working towards a world where everyone has the healthcare they need when disasters or crises hit. Drawing from our membership register of 1000 global healthcare professionals, we recruit and train teams who are ready to deploy within 24 hours’ notice to calls for emergency medical assistance from across the world following crises like disease outbreaks, natural disasters and conflict.

UK-Med delivers comprehensive preparation training to members of our register who may deploy with us to respond to medical emergencies across the world. The register consists of medical and humanitarian professionals with a wide range of skillsets and experiences recruited across the world.

Our register preparation trainings aim in various ways to prepare staff and register members for the reality of deploying into a humanitarian context. Our courses are divided into learning pathways, consisting of several courses each. Some pathways are to be completed by all users upon registering whilst others are specialist pathways for assigned individuals. The online trainings range from mandatory induction and security training to specialist courses that will equip learners with essential skills related to UK-Med’s responses such as leadership skills. An overview of our training offer can be found here.

Our courses are delivered in different ways, some are completely self-directed whereas others take a blended approach with either live online sessions or in-person training supporting the eLearning. In the future we are also hoping to have more resources available in interactive formats on the LMS, for example a guideline or toolbox.

UK-Med’s eLearning is currently hosted on Kaya, it currently has about 800 registered learners, and include about 20 courses of various duration (1 hour to 2 days). As UK-Med's contract with Kaya is coming to an end, UK-Med is opening this tender for bids to provide an LMS solution for the next five years.

Target audience
Users of our LMS are UK-Med Core staff and members of our international register. At the moment the register and core team amounts to around 1000+ people but the LMS should be able to cater to expected growth of UK-Meds activities and include up to 2000 users.

User characteristics and considerations:
- Multidisciplinary group of UK-based and international clinicians and humanitarians.
- Speak English but not all as their first language.
- Have internet access but sometimes in low connectivity and bandwidth areas.

Main outcome

UK-Med has a fully customized Learning Management System that allows core staff members do develop and manage courses without the need for understanding complex coding. The Learning Management System shows clear pathways of learning and allows administrators access to comprehensive user data tracking tools.

Scope of Work

The successful supplier will provide the Learning Management System for UK-Med for a five-year period. The LMS will be the main learning platform for UK-Med.

The successful supplier is expected to develop a detailed project management plan at the beginning of the period, which outlines the timeframe, key activities, and milestones for delivering the LMS solution. This plan should consider as a minimum, an initiation phase with introduction/training of UK-Med key staff members and support to transfer of courses from current LMS solution. Currently, the LMS has 800 learners with on average 20 new learners added per month. The LMS currently contains 20 courses ranging from 100mb to 1.5 gb. Further details will be provided to the successful supplier in order to plan the time and resources for the transfer.

Following the initiation phase, the successful supplier should provide ongoing technical support as needed to UK-Med staff.

Timescale

The successful supplier is expected to:
- Start the contract on contract award and signing (estimated mid June 2023)
- Collaborate with UK-Med to transfer data (learners, learner data and courses) from existing LMS (Kaya) to the new LMS.
- Have a fully operational LMS with integrated data from existing learners and courses by end of September 2023.

Technical specifications (50 in total)

General specifications:
- **(Essential)** 3–5-year minimum contract
- **(Essential)** Agreement that UK-Med maintains the rights to all content.
- **(Essential)** Ability to service 2000 users.
- **(Essential)** High speed and performance in low connectivity areas.
- **(Essential)** Optimization for phones, tablets, and computers.
- **(Desirable)** Experience of working with smaller organisations and preferably in the humanitarian/development sector. References required.
- **(Essential)** Must support multiple languages and/or translation and as a minimum English, French, Arabic, Ukrainian, Russian, and Spanish.

Collaboration and social learning:
- **(Desirable)** Ability to assign individual users into cohorts with separate discussion forum and ability to assign tasks, make announcements etc.
- **(Desirable)** Ability to create learning communities with the following features:
  - Discussion boards at
    - Cohort
    - Course
    - Global
  - Two-way private messaging
  - File and content sharing, announcements.

Reporting
- **(Essential)** Ability to report on course and pathway completion of users and to track and monitor learning progress.
- **(Essential)** Ability to collect user feedback on learning experience.
- **(Desirable)** Integration with Survey Monkey.
- **(Desirable)** Measuring other metrics such as average time spent on each course.

Content and content creation:
- **(Essential)** Interactive design UI, allowing custom template designs to be constructed.
- **(Essential)** Must be compatible with Articulate / Rise360.
- **(Essential)** Ability to create clear learning paths with the following features:
  - Ability to visually display learning paths for the learner.
  - Courses can be combined to create individual learning pathways (customized learning for the individual)
  - Ability to display the relationship between courses (e.g., Pre-Deployment Course is precursor for Deployment course)

- **(Essential)** Ability to import content from various formats including SCORM, PowerPoint, Audio (MP3), Video (MP4, embed, AVI, etc.), MS Word, Excel, Adobe Captivate, PDF, etc.

- **(Essential)** Ability to set up different assessment types including quizzes, surveys, question repository, upload a video for assessment.

- **(Desirable)** Downloadable transcripts from videos and other content, including PDF, PPT and Video/audio files.

**Admin:**

- **(Essential)** Allows for fully customizable home pages and course pages without the need to understand coding.

- **(Essential)** Ability to register users by email and excel import CVS/xml.

- **(Essential)** Role-based access to the LMS and ability to assign different access levels with the following levels: 1) organisational admin who can assign roles and give admin rights, 2) Editing trainer (global level), 3) Editing trainer (course level) 4) Learner.

- **(Essential)** Ability for organizational admin to see learners’ progression through a pathway and/or course (with percentage completion rates) for the learner.

- **(Essential)** Functionality to create individual, automatic course level certificates which are fully editable by staff at UK-Med (access user level 1-3).

**Course Management:**

- **(Essential)** Ability to both assign and enrol learners to different courses whilst some courses are ‘open to all’.

- **(Essential)** Test/Draft creation that allows admin users to create a course/page and view as a regular user before publishing live version.

- **(Desirable)** Ability to tailor communications and dashboards to specific cohorts of individuals

**User Interaction:**

- **(Essential)** Course continuity function, meaning that learners can break in courses and continue where they left off.
- **(Essential)** The user profile includes course tracking and the option to display completed and enrolled courses along with dates.
- **(Desirable)** Calendar function with overview of course dates and milestones.

**Data and integration:**
- **(Essential)** Integration with corporate systems via API. Can export data in a format and manner CVS, XML, PDF, RSS, RDF supported by common data flow tools, including widely adopted "low code" platforms, to enable automated data flow between the LMS and other platforms (e.g., the organisations CRM, Beacon, Office365, SurveyMonkey)
- **(Essential)** Ability to connect with other APIs such as PowerBI for data extraction and import.
- **(Desirable)** The ability to alter values with the new database after importing data from an existing LMS

**User Interface (Design/Visual):**
- **(Essential)** Customisable white-label LMS to ensure compliance with UK-Med branding guidelines.
- **(Essential)** A user-friendly dashboard providing clear navigation to essential areas — which can be personalised to each user’s needs.

**Customer support:**
- **(Essential)** 24/7, 365 technical support, covering information requests, support with updates and changes, and bug fixing. Quick response time a necessity.
- **(Essential)** Support that can respond to requests from admin user and learners.
- **(Essential)** Close working relationship to ensure downtime is scheduled and minimal, considering UK-Med’s operational needs at the time.
- **(Essential)** Provides accessible video tutorials and help docs written in plain language.
- **(Essential)** Accessible contact phone number.

**Security:**
- **(Essential)** Platform security reviewed and updated regularly in line with current industry best practice.
- **(Essential)** Users to manage and update their own access details requiring as little assistance from UK-Med staff as possible.
- **(Essential)** User completion data retained even in the event of account closure/de-activation.

**Platform resilience**
- **(Essential)** Central administration account to have access to all user created/managed accounts.
- **(Essential)** Platform should be able to store very large amounts of data and provide access to large files. Should be able to handle large data changes/requests with minimal impact and without difficulty.
- **(Essential)** Platform should always remain live, excepting unforeseen technical difficulties or essential maintenance.
- **(Essential)** Unscheduled down time should be very infrequent (>99% uptime).
- **(Essential)** Not computer resource intensive to run/navigate. Should provide a functional user experience regardless of machine specification or internet connection quality.
- **(Essential)** Effective backup approach e.g., regular backup schedule.
# SUBMISSION GUIDANCE & SELECTION PROCESS – Stage 1

Suppliers will be shortlisted for Stage 2 based on the following selection criteria.

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Definition</th>
<th>Supporting documentation required</th>
<th>Percentage Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Overall costs</td>
<td>Please provide a financial proposal which includes a budget, which clearly breaks down each expense for implementation, including an hourly rate or other measurement of the costs for transferring data from the existing UK-Med LMS to new one. The budget must include as a minimum, initial set-up costs, admin fees, annual subscription fees, transfer of data, and any costs for other services provided.</td>
<td>Financial proposal including budget breakdown.</td>
<td>20%</td>
</tr>
</tbody>
</table>
| 2 Technical criteria | Overview of which technical specification the LMS provides with clarifying comments as needed. Supported by screen shots/mock-up of user interface which demonstrates examples of:  
- Clear visual learning pathway and learner progression  
- Social learning elements e.g., forum  
- Learner dashboard  
- Course dashboard page | Completed specification checklist | 40% |
| 3 History of similar work with other 3rd sector/NGOs | Provide a portfolio demonstrating 2-3 pieces of similar work undertaken within the 3rd, humanitarian or development sector. | Reference information/portfolio of similar work | 10% |
4 Project Management and customer support  
Provide a detailed project delivery plan (max 3 pages) with suggested timeframes and milestones for implementation of the LMS, including for the transfer of data from the existing LMS. Outline of customer support and client management once the LMS is up and running.

Share the customer support approach, detailing how the contract will be managed, how support will be provided to UK-Med and learners (1-2 pages). Add any customer policy

Project description with Gantt Chart or similar  
Customer support policy  
25% Minimum score of 60 required to Pass.

5 Financial Stability  
Demonstrated financial stability over the past 3 years

Submission of published accounts for the past 3 years  
Company number/registration detail  
5%  

6 Supplier due diligence and supplier declaration  
Specific criteria stated  
Satisfactory completion  
Pass/Fail  

Scoring guidance
In the event of a Bidder failing to meet the minimum ‘pass’ scoring requirements listed above, the UK-Med reserves the right to disqualify the Bidder.

Non-Pricing scoring

Unless otherwise stated, each selection criteria or question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question. Weighted Score = \{weighting percentage\} x \{score\}
The 0-100 score shall be based on (unless otherwise stated within the question):

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>The Question is not answered, or the response is completely unacceptable.</td>
</tr>
<tr>
<td>10</td>
<td>Extremely poor response – they have completely missed the point of the question.</td>
</tr>
<tr>
<td>20</td>
<td>Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.</td>
</tr>
<tr>
<td>40</td>
<td>Poor response only partially satisfying the question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.</td>
</tr>
<tr>
<td>60</td>
<td>Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.</td>
</tr>
<tr>
<td>80</td>
<td>Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.</td>
</tr>
<tr>
<td>100</td>
<td>Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.</td>
</tr>
</tbody>
</table>

All questions will be scored based on the above mechanism unless otherwise stated. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

**Pricing Elements**

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.
Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80.
Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.
Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.
Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.
Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.
Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.
This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion.

In the event of a Bidder exceeding the maximum budget listed in the Budget and Timescales section of Document 2, UK-Med reserves the right to disqualify the Bidder.

**SELECTION PROCESS – Stage 2**

The shortlisted suppliers from stage 1 will move to stage 2. Depending on the nature of the proposals, 2-5 of them are expected to proceed to stage 2.

In stage 2, the shortlisted suppliers will be asked for the following:

1) Make a presentation of the LMS platform to UK-Med selection committee (online), answering a few key questions which will be defined by UK-Med and shared in advance, giving time for preparation as needed.

2) Give UK-Med access to a trial version of the LMS platform for a limited time to experience the different functions outlined in the technical specifications.

A holistic assessment of the bids will be made by a panel based on the presentation and trial version and scored based on:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Maximum points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General user friendliness</strong>:  Is the platform intuitive to a new user with clear learning pathways, offering a clear overview of progress and next steps for the learner.</td>
<td>40</td>
</tr>
<tr>
<td><strong>Admin and trainer usability</strong>: Is the platform management user friendly, including reporting? Is it easy to set up courses and pathways from platform trainer level?</td>
<td>40</td>
</tr>
<tr>
<td><strong>Design</strong>: Is the platform visually appealing, with good and flexible options for customizing the look and feel of the platform?</td>
<td>20</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>