**Learning Management System**

**Invitation to Tender**

**Requirement specification**

1. **Introduction**

NICE, established under the Health and Social Care Act 2012, is the executive Non Departmental Public Body responsible for providing guidance and advice to support health and social care commissioners, providers and others to make sure that the care and preventative services provided are of the best possible quality and offers the best value for money. NICE has a statutory role that encompasses the development of quality standards, advice, information and recommendations about NHS, public health and social care services. NICE provides independent, evidence-based guidance on the most effective ways to prevent, diagnose and treat disease and ill health and reduce health inequalities, and operates an independent accreditation programme to validate the guidance production of external organisations. Documents describing the methods and process employed by NICE are available from the NICE’s website (available at [www.nice.org.uk](http://www.nice.org.uk) ).

NICE is seeking bids through this invitation to tender to select a supplier to provide a **Learning Management System** for NICE for a period of 3 years from contract award, with an option to extend for a further 2 x 12 months.

**Please note:** **we welcome bids for all of the services set out in the specification.** The total budget for this contract is £60,000 including initial set up fees (excluding VAT).

1. **Background**

## NICE is seeking to implement a Learning Management System to provide management information about all training and development records for approximately 600 employees. The desired Learning Management System is to include capability for booking, recording and reporting all development activity and for this to automatically feed into performance appraisals through the system. Our current systems are limited. They rely on the manual processing of data which is difficult to reconcile and is administratively a burden for managers and HR. Our current methods allow for very limited or no user self-service.

## IT requirements

The system must be either Cloud based or if to be hosted by NICE be Microsoft Windows based (Windows Server 2008 R2 or Windows 2012 R2).

1. For **both** Cloud hosting and NICE internal Hosting the software or service being provided **must:**
   1. Support Internet Explorer 10 and newer versions or Google Chrome, if browser based
   2. Not require the user logged onto the PC or device using the software or service, to have any administration rights to the device or operating system in order to use the software or service. For example, on a Microsoft windows 7 machine, the user cannot be a member of the administrators or power users groups to use any part of the software or service.
   3. Allow the user of the software or service to run it on either a Windows Remote Desktop Services (Terminal Server) computer or on a virtual computer running within a Virtual Desktop Infrastructure environment.
   4. Not require the use of cloud based document storage/sharing systems such as dropbox or google drive. If the functionality is available, it must be possible to disable it.
   5. Be compatible with the NICE standard VDI Desktop, which is a 32bit dual core machine with 2Gb RAM. Any requirements over this must be clearly highlighted.
   6. Be compatible with Microsoft office 2010 and 2013
   7. Support Microsoft Windows 7 (32bit and 64bit) client operating system.
2. For **both** Cloud hosting and NICE internal Hosting the software or service being provided **should**:
   1. Support Microsoft Edge, if browser based.
   2. Not require any TCP or UDP ports outside of HTTP (80) or HTTPS (443) to access the software or service? Any requirements over this,must be clearly highlighted, listing the ports required and their function.
   3. Be compatible with Microsoft office 2016 within 6 months of the contract being awarded
   4. Support Windows 10 operating system within 6 months of the contract being awarded

## Please include System requirements and provide a set up guide for your Learning Management System within your bid for the tender. Please also detail any access you would require to the system, to provide support.

1. **If** to be hosted by NICE:
   1. Please indicate whether the software or service requires any server components, or whether it is client software only.
   2. The software or service being provided **must**:
      1. Run on Microsoft Windows Server 2008 R2 or Windows 2012 R2, if servers are required.
      2. Allow for the underlying server to be running in a VMware Virtual Environment, if servers are required.
      3. Run on Microsoft SQL Server 2008, 2008 R2 or 2012, if an external relational database is required. Other databases embedded within the product that require no additional management and are compatible with the business continuity requirements defined will be considered.
2. **If** the software or service is to be hosted by NICE, it **should**:
   1. Not require any additional software, outside of a browser or standard Microsoft office products. Any requirements over this, must be clearly highlighted (i.e. Java or Silverlight).
   2. Support Active Directory integration or single sign on. Please provide details of the solution used.
   3. If run on Microsoft SQL, allow the database to run on a server which is shared with other databases. A dedicated SQL Server instance may be considered, if costs allow.
   4. Support SQL Database Mirror, Always On Availability Groups or Transactional/Merge Replication for business continuity. Other warm standby methods may be considered, but should be clearly explained.
   5. For multi-site deployment and disaster recovery, support multiple front end servers (scale out) running from either a single database or replicated databases.
3. **If** cloud based, the software or service provided **must:**
   1. Be hosted on servers that are located within the European Union or, or be part of the Safe Harbour Program or detail equivalent such as ‘Truste’ certification.
   2. Not require any software (including plugins), to be installed on the client PC or require local operating system administration rights to install.
   3. Have adequate measures in place, to ensure minimal loss of any data
   4. Have adequate measures in place, to ensure minimal downtime to access the software or service. Please detail any downtime incurred within the last 12 months.
   5. Have adequate security measures in place, both technical and physical, to ensure data is reasonably protected.
4. **If** cloud based and the software or service provided supports single sign on or Active Directory integration, it **should**:
   1. Use Microsoft Active Directory Federation Services. Other solutions may be considered depending on the level of security offered. Solutions that require substantial portions of active directory data to be copied to the provider will not be considered.

## Confidentiality

The parties acknowledge that, except for any information which is exempt from disclosure in accordance with the provisions of the Freedom of Information Act (FOIA) and/or the Data Protection Act (DPA), the content of the resulting Contract is not Confidential Information. NICE shall be responsible for determining in its absolute discretion whether any of the content of the Contract is exempt from disclosure in accordance with the provisions of the FOIA and/or the DPA.

Information that is supplied to offerors as part of the procurement exercise is supplied in good faith. However, offerors must satisfy themselves as to the accuracy of such information and no responsibility is accepted for any loss or damage of whatever kind or howsoever caused arising from the use by offerors of such information, unless such information has been supplied fraudulently by NICE.

Information that is supplied or received during the tender process will be kept confidential for the period of the tender process. At the end of the tender process all information that NICE holds will be subject to FOIA.

## Account Management

### The provider shall provide effective and responsive account management.

### Environmental

## To demonstrate commitment to environmental standards generally and a low carbon footprint, and to comply with relevant legislation

# Contract period

## The contract will run for a period of 3 years from contract award, with an option to extend for a further 2 x 12 Months.

# The Requirement

NICE requires the following to be included in the system:

**Mandatory**

1. Ability to fully brand communications through the system as NICE.
   1. Can the NICE Logo and style be incorporated throughout system communications to staff?
   2. Please specify the areas where the system can be branded as NICE.
2. Ability for employees to login to the system to track and manage their own development.
3. Individuals to have their own profile/record on the system?
4. Managers profiles/records to also include team data in order to manage and track progression, competency and compliance.
5. Will managers be able to view/ have an overview of their team’s profiles through their own profile?
6. Capability to pre-set skill matrices for roles, with easy links to appropriate courses
7. Can skill matrices be added to the system by role type?
8. Can individuals be automatically enrolled on training when allocated to a role type?
9. Upload capability for internal course booking.
10. Can existing internal courses be uploaded, booked and managed through the system and if so how?
11. NICE user access to a relevant training database of external courses. Examples of relevant courses are: Economic evaluation in health care, Systematic reviews and critical appraisal, APM, APMP,MSP. Plus varied soft skills such as having difficult conversations and assertiveness.
12. Can users access external courses through the system and if so how?
13. Are we able to add existing suppliers/courses to the data base?
14. Is this database managed and updated by the Supplier?
15. What development activity are individuals able to record over and above training courses into the system? For example CPD or mentoring relationships.
16. Capability for employees to self-book training with a range of approval mechanisms in place.
17. Can employees self-book training through the system?
18. Does the system have the ability to put approval mechanisms in place to ensure only approved training is booked?
19. Does the system allow for 2 or more approvers? Please specify the number of approvers the system allows.
20. Can automated alerts be sent when approval is needed and made?
21. Ability to set permissions within various departments and teams for what and who’s information they can access and amend which can be configured to reports.
22. Please explain what levels of permissions are available.
23. Ability to monitor and report on compliance for mandatory training at individual, team, and corporate level.
24. Can Mandatory training be allocated to individuals and monitored?
25. Can compliance be reported on at individual and team level by a manager or system administrator?
26. Can automated alerts be sent when mandatory training is due for renewal?
27. Ability to report on individual record, team records, and corporate wide.
28. Can the system provide real time comprehensive reports on all activity and data at individual, team, corporate wide level?
29. Can data be exported to CSV file?
30. Can the system provide real time comprehensive reports on all budget spend activity and data at individual, team, corporate wide level?
31. Budget monitoring built into the system.
32. Does the system have the ability to allocate purchase orders? If so how?
33. Does the system have the ability to allocate cost codes to training bookings? If so how?
34. Does the system have the ability to include costs to training bookings?
35. Pre and post course assessment.
36. Please outline the available functions for pre and post course assessment.
37. Evaluation aligned up to Kirkpatrick level 4 with the ability to asses and report on competency.
38. What level of evaluation is your system able to provide and how?
39. Can competency be assessed and How?
40. Appraisal functionality to record on-going development, appraisal conversations and professional development plans that are largely automated by the ongoing data input into individuals profiles.
41. Can the system automate annual appraisal information based on data gathered throughout the year from personal profiles?
42. Is there ability to upload documents into the appraisal function?
43. E-learning functionality (within the system or compatible with other systems).
44. Can existing E-Learning content and historical data be uploaded into the system?
45. Can new off the shelf E-Learning courses Supported through the system and How?
46. Can new E-Learning courses be designed and developed in house through the system and how?
47. NICE needs to have an accessible support line for administration and technical assistance.
48. Please outline the available support.
49. Supported on mobile devices.
50. Can the system be accessed through IOS, Android and windows??

**System IT requirements:**

As listed on pages 1, 2 & 3

**Desirable**

Compatible with Electronic Staff Records (ESR)/ Active Directory for imports and exports enabling new starters, leavers and internal moves to be automatically amended.

1. Can the system communicate to other systems to automate starters, leavers and change to role?
2. Has the system ever been used for this purpose? Please give an example.
3. Do you currently have clients that use the system to communicate with Electronic Staff Records (ESR)? If so how is this used?

Clinical revalidation capability.

1. Does the system have the capability to carry out clinical revalidation? If so please provide information on this function.

360 feedback function/module.

1. Does the system have the capability to carry out 360 feedback? If so please provide information on this function.

# Your bid

## Please describe how your company will provide the services including/responding to the following points:

1. Please include your system requirements and setup guide
2. Please provide a summary of external courses available through the database.
3. Please provide names and contact details for 3 organisations we can refer to for confirmation of your organisation’s proven ability to carry out this type of work.
4. NICE recognises that some SMEs (Small, Medium Enterprises) (less than 50 people for a Small Enterprise and less than 250 for a Medium Enterprise) may not have formal policies available but still operate their businesses in a manner that is conducive to the above. If you are an SME and do not have formal policies in place, please submit with your response a written statement of how your company operates in light of the above three areas of legislation and best practice. If an SME does not have 3 years of account due to being recently established then annual accounts must be provided where available along with a balance sheet for the current year. If this is the first year of trading for an SME then a current balance sheet must be provided. NICE may require further information in order to verify the existence of any company submitting a bid
5. All offers must be written in English.
6. All offers must be provided in GBP sterling and all costs be exclusive of VAT.
7. All offers must be submitted in accordance with the Crown Commercial Service (CCS) framework mini competition.
8. NICE does not bind itself to accept the lowest or any offer.
9. NICE reserves the right to amend the specification at any time prior to the stated tender deadline.
10. All tender documents will remain the property of the NICE and will not be altered or amended in any way.

**Timeline**

|  |  |
| --- | --- |
| Issue tender | 19/11/2015 |
| Deadline for Expressions of Interest | 24/11/2015 |
| Deadline for Tender Questions | 24/11/2015 |
| Answers sent out by | 25/11/2015 |
| Tender receipt deadline | 12 noon 01/12/2015 |
| Interviews | 16/12/2015 |
| Award contract | 17/12/2015 |
| Contract start | 18/01/2016 |

**Budget**

There is a maximum of £20,000 per annum available for this work. Bidders are requested to fully cost their tenders - please provide full cost breakdowns and rationales. Fees are inclusive of all costs and expenses, including travel to site, but exclusive of VAT

**Failure to comply with these instructions may result in your offer being rejected.**

1. **Selection Criteria**

Tenders will be assessed on the basis of the following mandatory and desirable criteria for selection for interview and at interview.:

|  |  |  |
| --- | --- | --- |
| **Mandatory** | | **Weighting** |
| 1. | Ability to fully brand communications through the system as NICE.   * 1. Can the NICE Logo and style be incorporated throughout system communications to staff?   2. Please specify the areas where the system can be branded as NICE. | 5 |
| 2. | Ability for employees to login to the system to track and manage their own development. | Pass/Fail |
| 3. | Individuals to have their own profile/record on the system? | Pass/Fail |
| 4. | Managers profiles/records to also include team data in order to manage and track progression, competency and compliance.   1. Will managers be able to view/ have an overview of their team’s profiles through their own profile? | Pass/Fail |
| 5. | Capability to pre-set skill matrices for roles, with easy links to appropriate courses   1. Can skill matrices be added to the system by role type? 2. Can individuals be automatically enrolled on training when allocated to a role type? | Pass/Fail |
| 6. | Upload capability for internal course booking.   1. Can existing internal courses be uploaded, booked and managed through the system and if so how? | 4 |
| 7. | NICE user access to a relevant training database of external courses. Examples of relevant courses are: Economic evaluation in health care, Systematic reviews and critical appraisal, APM, APMP,MSP. Plus varied soft skills such as having difficult conversations and assertiveness.   1. Can users access external courses through the system and if so how? 2. Are we able to add existing suppliers/courses to the data base? 3. Is this database managed and updated by the Supplier? | 4 |
| 8. | What development activity are individuals able to record over and above training courses into the system? For example CPD or mentoring relationships. | 4 |
| 9. | Capability for employees to self-book training with a range of approval mechanisms in place.   1. Can employees self-book training through the system? 2. Does the system have the ability to put approval mechanisms in place to ensure only approved training is booked? 3. Does the system allow for 2 or more approvers? Please specify the number of approvers the system allows. 4. Can automated alerts be sent when approval is needed and made? | Pass/Fail |
| 10. | Ability to set permissions within various departments and teams for what and who’s information they can access and amend which can be configured to reports.   1. Please explain what levels of permissions are available. | 5 |
| 11. | Ability to monitor and report on compliance for mandatory training at individual, team, and corporate level.   1. Can Mandatory training be allocated to individuals and monitored? 2. Can compliance be reported on at individual and team level by a manager or system administrator? 3. Can automated alerts be sent when mandatory training is due for renewal? | 5 |
| 12. | Ability to report on individual record, team records, and corporate wide.   1. Can the system provide real time comprehensive reports on all activity and data at individual, team, corporate wide level? 2. Can data be exported to CSV file? | 4 |
| 13. | Can the system provide real time comprehensive reports on all budget spend activity and data at individual, team, corporate wide level? | 4 |
| 14. | Budget monitoring built into the system. | Pass/Fail |
| 15. | Does the system have the ability to allocate purchase orders? If so how? | 4 |
| 16. | Does the system have the ability to allocate cost codes to training bookings? If so how? | 4 |
| 17. | Does the system have the ability to include costs to training bookings? | 4 |
| 18. | Pre and post course assessment.   1. Please outline the available functions for pre and post course assessment. | Pass/Fail |
| 19. | Evaluation aligned up to Kirkpatrick level 4 with the ability to asses and report on competency.   1. What level of evaluation is your system able to provide and how? 2. Can competency be assessed and How? | 4 |
| 20. | Appraisal functionality to record on-going development, appraisal conversations and professional development plans that are largely automated by the ongoing data input into individuals profiles.   1. Can the system automate annual appraisal information based on data gathered throughout the year from personal profiles? 2. Is there ability to upload documents into the appraisal function? | 8 |
| 21. | E-learning functionality (within the system or compatible with other systems). | Pass/Fail |
| 22. | Can existing E-Learning content and historical data be uploaded into the system? | 4 |
| 23. | Can new off the shelf E-Learning courses Supported through the system and How? | 4 |
| 24. | Can new E-Learning courses be designed and developed in house through the system and how? | 4 |
| 25. | NICE needs to have an accessible support line for administration and technical assistance.   1. Please outline the available support. | 5 |
| 26. | Supported on mobile devices.   1. Can the system be accessed through IOS, Android and windows?? | 4 |
|  | **Cost** | 20% |
|  | **TOTAL** | **100%** |
| **Desirable** | |  |
|  | Compatible with Electronic Staff Records (ESR)/ Active Directory for imports and exports enabling new starters, leavers and internal moves to be automatically amended | 50% |
|  | Clinical revalidation capability | 20% |
|  | 360 feedback function/module | 30% |
|  | **TOTAL** | **100%** |
| **IT Requirements**. | | |
| **IT Cloud and Hosted** | |  |
| 1a | IE10 and newer versions or Chrome support | Pass/Fail |
| 1b | Requirements for User Administration Rights | Pass/Fail |
| 1c | Remote Desktop Services or VDI compatibility | Pass/Fail |
| 1d | Cloud based document sharing requirements | Pass/Fail |
| 1e | NICE Standard VDI Desktop compatibility | 40% |
| 1f | Office 2010/2013 compatibility | Pass/Fail/Not Applicable |
| 1g | Windows 7 compatibility | Pass/Fail |
| 2a | Edge Browser support | 10% |
| 2b | Additional port access required | Pass/Fail/Not Applicable |
| 2c | Office 2016 support | 20% |
| 2d | Windows 10 support | 20% |
| 3 | Ease of install and supplier access required for install | 20% |
|  | Hosted by NICE |  |
| 4a | Server Requirements | 20% |
| 4bi | Windows compatibility | Pass/Fail/Not Applicable |
| 4bii | Server Virtual Infrastructure support | Pass/Fail/Not Applicable |
| 4biii | Database compatibility | Pass/Fail/Not Applicable |
| 5a | Additional Software requirements | Pass/Fail/Not Applicable |
| 5b | Active Directory or Single Sign on Support | 10% |
| 5b | Active Directory/Single Sign on security | Pass/Fail/Not Applicable |
| 5c | Database shared server support | 20% |
| 5d | Support SQL Database Mirror, Always On Availability Groups or Transactional/Merge Replication for business continuity | 10% |
| 5e | support multiple front end servers (scale out) | 10% |
| **Cloud based** | |  |
| 6a | Hosted within European Union or part of Safe Harbour or equivalent certification | Pass/Fail/Not Applicable |
| 6b | Additional Software Requirements | Pass/Fail/Not Applicable |
| 6c | Measures to minimise data loss | 10% |
| 6d | Measures to minimise downtime | 10% |
| 6e | Security measures to protect data | 30% |
| 7 | Active Directory or Single Sign on Support | 20% |
| 7a | Active Directory/Single Sign on security | Pass/Fail/Not Applicable |
|  | **TOTAL** | **250%** |

1. **Transparency**

In light of the governments need for greater transparency, suppliers and those organisations looking to bid for public sector contracts should be aware that if they are awarded a contract for this work, the resulting contract between the supplier and NICE will be published in its entirety. In some circumstances, limited redactions will be made to some contracts before they are published in order to comply with existing law and for the protection of national security. Suppliers are asked to make any sections of their tender that they regard as ‘Commercial in Confidence’ or ‘subject to the non-disclosure clauses’ of the Freedom of Information Act or the Data Protection Act clear within the submission documents. Please note that the total value (bottom line) of the agreement is required to be published under current EU regulations and the UK governments Transparency Agenda. If you require clarity on this point, please contact us via the route stated above.

1. **Cost Evaluation**

In light of the government’s drive for transparency, NICE is providing the formula that will be used for the cost evaluation aspect and the scoring guide.

**Cost Evaluation**

The cost will be evaluated using the following formula:

Lowest Bidder’s Price / Bidder’s Price X 20%

**Criteria and Scoring Guide**

Each evaluator will independently evaluate each tender submitted and use the following guide to score each criteria, the scores of all evaluators per criteria are then averaged and the criteria weighting is then applied to give an adjusted score.

|  |  |
| --- | --- |
| Scoring Note |  |
| -5 | The point is omitted |
| 0 | The point is not explained/ repeat of specification |
| 1 | The point is not acceptable |
| 2 | The point is possibly acceptable |
| 3 | The point is acceptable |
| 4 | The point is well made and acceptable |
| 5 | The point exceeds expectations/excellent |

**Non Compliance**

NICE expressly reserves the right to reject any proposal that -:

* Does not follow the instruction to tender guidance.
* Is an incomplete proposal, where answers to any questions are not provided, or a reasonable explanation is not provided of why any answer to any question has been omitted.
* Refusal to adhere to or significant unacceptable changes made to the Terms and Conditions of Contract.

## Questions

Before the offers are submitted, those wishing to tender may have specific questions and queries regarding the process, the policy or the arrangements with NICE. Under our procurement arrangements NICE has to ensure that all applicants receive equal treatment and we will share all information requests and responses with all applicants. Please submit all *questions* and queries to Gillian Watson by email to [gillian.watson@nice.org.uk](mailto:kaylea.stoddard@nice.org.uk) by 17.00hrs on 24th November 2015 and the responses will be issued together with the original questions by email to all who have expressed interest by 17.00 on 25th November 2015.

## Cost

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | |  | |  | |  | |  | |  |
| Please provide a cost breakdown of the budget necessary to deliver the service (excluding VAT). You’re breakdown must include the following Costs Description (must include all relevant data) | | | | | | | | | |
|  | Staff/ Resource Description | No.of Days per Staff/ Resource | | Day Rate per Staff/ Resource (£) | | Other cost - please detail | | Total Cost (£) | |
| All initial set up fees including what services are provided |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |
| Any Yearly Costs and a breakdown of services this includes |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |
| Licence costs broken down per user based on 600 users |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |
| All maintenance costs for the duration of the contract broken down per year. |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |
| Any additional module costs outside your standard system build |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |
| Any other costs |  |  | |  | |  | |  | |
|  |  |  | |  | |  | |  | |
| Total Costs (£ excluding VAT): |  |  | |  | |  | |  | |

Travel and Subsistence is to be included in the resource costs above.



## Policies and Financial Statements

Please provide one copy each of your organisations:

Health and Safety Policy

Environmental Policy

Equal Opportunities Policy

Diversity in the Work Place Policy

Copies of the last three years audited accounts

A current Balance Sheet