**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 Cloud based or be Microsoft Windows based (Windows Server 2008 R2 or Windows 2012 R2).
* If cloud based, the servers must be located in Europe, or participate in the European Safe Harbour Program
* Not require any administration rights for Users or Product Administrators (Admin rights for initial install or upgrades is accepted)
* Not require use of cloud based document storage/sharing systems such as Dropbox, Google Drive
* Be supported in a Virtual Environment
* Be compliant with Microsoft SQL Server 2008, 2008 R2 or 2012(database server is shared with other databases)
* Be compliant with SQL Database Mirror or Transactional/Merge Replication support (for disaster recovery)
* Be Able to have multiple front end servers (scale out) running either from a single database or from replicated databases
* Be Able to support for Internet Explorer 10+ (including IE11)
* Be Able to support for Windows 7 (32bit and 64bit) and 10
* Be compatible with office 2010 and 2013
* Be compatible with Windows Remote Desktop Services (Terminal Server) and VDI (i.e. VMware View)
* Be compliant with the NICE standard VDI Desktop is a 32bit dual core machine with 2Gb RAM. Any requirements over this should be highlighted

## Please include System requirements and set up guide for your Learning Management System within your bid for the tender.

## 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**

* Ability to fully brand the system as NICE.
  + Can the NICE Logo and style be incorporated throughout the system and its communications to staff?
* Easy to use intuitive system.
* Is the system intuitive?
* NICE user access to a large training database of external courses.
* Can users access external courses through the system and if so how?
* Are we able to add existing suppliers/courses to the data base?
* Is this database managed and updated by the Supplier?
* Upload capability for internal course booking.
* Can existing internal courses be uploaded, booked and managed through the system and if so how?
* Ability to monitor and report on compliance for mandatory training at individual, team, and corporate level.
* Can Mandatory training be allocated to individuals and monitored?
* Can compliance be reported on at individual and team level by a manager or system administrator?
* Can automated alerts be sent when mandatory training is due for renewal?
* Capability for employees to self-book training with a range of approval mechanisms in place (via workflows).
* Can employees self-book training through the system?
* Does the system have the ability to put approval mechanisms in place via workflows to ensure only approved training is booked?
* Is there a limit to how many approvers are able to be included? What are these?
* Can automated alerts be sent when approval is needed and made?
* Budget monitoring built in that can record purchase order numbers and amounts including cost code allocations.
* Does the system have the ability to allocate purchase orders and cost codes to training bookings? If so how?
* Does the system have the ability to include costs to training bookings?
* Capability to pre-set skill matrices for roles, with easy links to appropriate courses
* Can skill matrices be added to the system by role type?
* Can individuals be automatically enrolled on training when allocated to a role type?
* Individual profiles/records for employees to track and manage their own development.
* Will individuals have their own profile/record on the system?
* Managers profiles/records to also include team data in order to manage and track progression, competency and compliance.
* Will managers be able to view/ have an overview of their team’s profiles through their own profile?
* Ability to report on individual record, team records, and corporate wide.
* Can the system provide real time comprehensive reports on all activity and data at individual, team, corporate wide level?
* Ability to report on budget spend and allocation.
* Can the system provide real time comprehensive reports on all Budget spend activity and data at individual, team, corporate wide level?
* E-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.
* Can the system automate annual appraisal information based on data gathered throughout the year from personal profiles?
* Is there ability to upload documents into the appraisal function?
* Ability to record all development activity (over and above training courses).
* Can CPD, mentoring relationships and other forms of development be inputted into the system through user’s profiles?
* E-learning functionality (within the system or compatible with other systems) for development of new content and upload of existing content and supported data.
* Can existing E-Learning content and historical data be uploaded into the system?
* Can new E-Learning courses be designed and developed/ Supported through the system and How?
* Pre and post course assessment.
* Please outline the available functions for pre and post course assessment.
* Evaluation aligned up to Kirkpatrick level 4 with the ability to asses and report on competency.
* What level of Kirkpatrick evaluation is your system able to provide and how?
* Can competency be assessed and How?
* To have an accessible support line for administration assistance.
* Please outline the available support.
* Supported on all digital platforms.
* Can the system be accessed through safari and Google chrome?
* Is the system accessible on mobile devices?
* Ability to set permissions for system administrators within various departments and teams for what information they can access and amend which can be configured to reports.
* Can security permissions be set to allow individuals access to certain aspects of the system? Please explain what levels of permissions are available.
* How many system administrators can the system have?

**Desirable**

* Compatible with Electronic Staff Records (ESR)/ Active Directory for imports and exports enabling new starters, leavers and internal moves to be automatically amended.
* Can the system communicate to other systems to automate starters, leavers and change to role?
* Has the system ever been used for this purpose? Please give an example.
* 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.
* Does the system have the capability to carry out clinical revalidation? If so please provide information on this function.
* 360 feedback function/module.
* 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:

* Please include your system requirements and setup guide
* Please provide a summary of external courses available through the database.
* 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.
* 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
* All offers must be written in English.
* All offers must be provided in GBP sterling and all costs be exclusive of VAT.
* All offers must be submitted in accordance with the Crown Commercial Service (CCS) framework mini competition.
* NICE does not bind itself to accept the lowest or any offer.
* NICE reserves the right to amend the specification at any time prior to the stated tender deadline.
* All tender documents will remain the property of the NICE and will not be altered or amended in any way.

**Timelines**

|  |  |
| --- | --- |
| Issue tender | 29/09/2015 |
| Deadline for Tender Questions | 13/10/2015 |
| Answers sent out by | 16/10/2015 |
| Tender receipt deadline | 12 noon 26/10/2015 |
| Award contract | 18/11/2015 |
| Contract start | 01/01/2016 |

**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** |  |
| Ability to fully brand the system as NICE  • to reports. | Pass/Fail |
| Easy to use intuitive system | Pass/Fail |
| NICE user access to a large training database of external courses | Pass/Fail |
| Upload capability for internal course booking | Pass/Fail |
| Ability to monitor and report on compliance for mandatory training at individual, team, and corporate level. | 15% |
| Capability for employees to self-book training with a range of approval mechanisms in place (via workflows) | Pass/Fail |
| Budget monitoring built in that can record purchase order numbers and amounts including cost code allocations. | 15% |
| Capability to pre-set skill matrices for roles, with easy links to appropriate courses | Pass/Fail |
| Individual profiles/records for employees to track and manage their own development. | Pass/Fail |
| Managers profiles/records to also include team data in order to manage and track progression, competency and compliance. | Pass/Fail |
| Ability to report on individual record, team records, and corporate wide | Pass/Fail |
| Ability to report on budget spend and allocation | 15% |
| E-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 | Pass/Fail |
| Ability to record all development activity (over and above training courses) | 10% |
| E-learning functionality (within the system or compatible with other systems) for development of new content and upload of existing content and supported data. | Pass/Fail |
| Pre and post course assessment | Pass/Fail |
| Evaluation aligned up to Kirkpatrick level 4 with the ability to asses and report on competency. | 15% |
| NICE needs to have an accessible support line for administration assistance. | Pass/Fail |
| Supported on all digital platforms | 10% |
| Ability to set permissions for system administrators within various departments and teams for what information they can access and amend which can be configured | Pass/Fail |
| **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%** |

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 13th October 2015 and the responses will be issued together with the original questions by email to all who have expressed interest by 17.00 on 16th October 2015.

## Cost

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | |  | |  | |  | |  | |  |
| 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