REQUEST FOR INFORMATION

The Environment Agency Learning Experience / Management System Defra.

Internally known as: LZ2025

Issue Date: Monday 15/03/21 - 17.00pm

Closing Date and Time: Thursday 01/04/21 - 17.00pm

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Dear …………..

RE: Request for Information for Environment Agency Learning Zone

The Environment Agency is currently reviewing the provision for their Learning Experience / Learning Management System, known internally as EA Learning Zone. As part of developing our plans to meet this requirement we are issuing this Request for Information (RFI). This RFI is one vehicle by which we can systematically identify similarities and differences between suppliers in the market, and additionally gain a greater understanding of specific suppliers' abilities, core business and strategic outlook with respect to this opportunity.

You are invited to submit a response to this RFI.

  We look forward to your response by the closing date and time provided on the cover page of our RFI documentation.

Yours sincerely

Tim Carter

Commercial Manager – Lead Major Projects

DGC Commercial

Section 1: Background

1. 1 Authority overview

The Environment Agency is an Executive Non-departmental Public Body responsible to the Secretary of State for Environment, Food and Rural Affairs. The Environment Agency is organised into eight directorates and our principal aims are to protect and improve the environment, and to promote sustainable development.

Further information on our responsibilities and how we are structured can be found on our website. https://www.gov.uk/government/organisations/environment-agency

1. 2 The Opportunity

The Environment Agency is reviewing the marketplace for an engaging and intuitive learning experience/learning management platform. The solution will be primarily targeted at internal Environment Agency employees but will also have the potential to share content across the wider Defra group and with the EA supply chain. Other key aspects/enhancements include:

Commercially of the shelf solution with some minor customisations.

Learning Experience - intelligent solution that aligns learners with targeted learning.

Capability and competency tracking - solution allows learners to record their skills and capabilities which can be used to generate management information at a team and organisational level.

This opportunity is known internally as LZ:2025 to align with a number of strategic business priorities to be realised by 2025.

1. 3 Purpose of the RFI

The purpose of this RFI is to allow the EA to assess supplier responses and use the information in future decision-making regarding supply of the Solution. Whilst it is the intent of the EA to compare supplier responses for the purposes of informing any subsequent OJEU Procurement, EA makes no obligations or undertakings in any way to:

- go to tender; or

- accept any RFI information received from suppliers; or

- include suppliers responding to this RFI in any future tender invitation; or

- any other commitment to suppliers whatsoever, including any intention to form a contract with any supplier for provision of the Opportunity.

1. 4 Overview of the business need

As described within the opportunity section, a high-level option review was concluded November 2019. Supporting this review, initial baseline requirements were drafted, and a Vision Statement was agreed:

- ***Deliver a solution that provides an intuitive, personalised and accessible learning experience that helps to develop a learning culture within the organisation. Empowering***

individuals and groups of learners, developing employee capability, career progression and building organisational resilience.

1. 5   *Overview of the As-Is Solution*

The solution today provides stakeholders across the EA with functionality that has evolved and refined during its lifecycle since inception in 2013. The solution is used by stakeholders of differing types and needs. There is limited access for third parties, primarily to an incumbent third-party supplier, contracted to provide event management administration services.

The following sections define those stakeholder types, describing at high-level how they interact with the solution today, and how we anticipate they will interact with a new solution going forwards, noting that we are flexible in approach and would like to provide a solution that supports a flexible approach to the 'way we work', and the stakeholders that use the solution.

The EA are always looking to improve and enhance services to provide greater functionality, whilst balancing this with experience and other organisational factors. Within the section of this document that describes architectural elements, you will see where the core 'motivations' are for this solution going forward and will note that taking a standard 'out of the box' approach will satisfy many of these motivations.

At high-level, the current solution provides functionality that we intend to maintain at a minimum[1], as follows:

- Ability to search for learning and development resources, on demand;

- Ability to book onto classroom-based training events, where there are currently circa 500 courses on offer across a variety of topics and specialisms such as Leadership and Management, Induction, Health, Safety and Wellbeing, Incident Management, Flood Risk and Coastal Risk Management, Environment and Business, Field Operations, Personal Effectiveness and Project Delivery profession; training events are administered via 3rd party administration team;

- Access to e-learning resources, where there are currently circa 150 different products on offer;

- Access to view or attend internally recorded or live learning webinar sessions;

- Access other learning resources, documents, audio or video recordings, podcasts.

The current solution also provides opportunity to manage and have oversight of learning activities. These are required going forwards and have been detailed within the published requirements. You will note that in many cases (within the requirements) we have built in enhancements to the current services by taking advantage of newer technologies such as Artificial Intelligence (AI) and Machine Learning (ML). Currently the solution allows relevant stakeholders to:

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[1] Noting this is not an exhaustive list but used a reference for the baseline solution today

- Create learning plans (for a performance year);

- View historic training records;

- Prompted when refresher training or mandatory training requires completion, be allocated required learning (training activities) such as the 'Incident Management Foundation' pathway;

- Signposted to other resources such as 'Ashridge' (executive learning and management training) resources;

- Stakeholders with elevated privileges (I.e. Line managers) to view their own people's training activity, approve learning plans, and training requests as required.

1. 6   *Overview of the Stakeholder User Base*

This section depicts and describes the key stakeholders within the business layer, referenced within the requirements for the solution. This is not intended to provide a full business layer abstraction but does contain some of the high-level business services, events and objects, as well as functionality required, to provide a working context for the business roles and actors defined as stakeholders that we are looking to deliver the solution for.

In total there are circa 11,200 stakeholders who currently use the solution. The following diagram provides an overview of the stakeholders by type, referenced within the requirements.

1. 7   *Diagrammatic Model of the Stakeholder User Base*
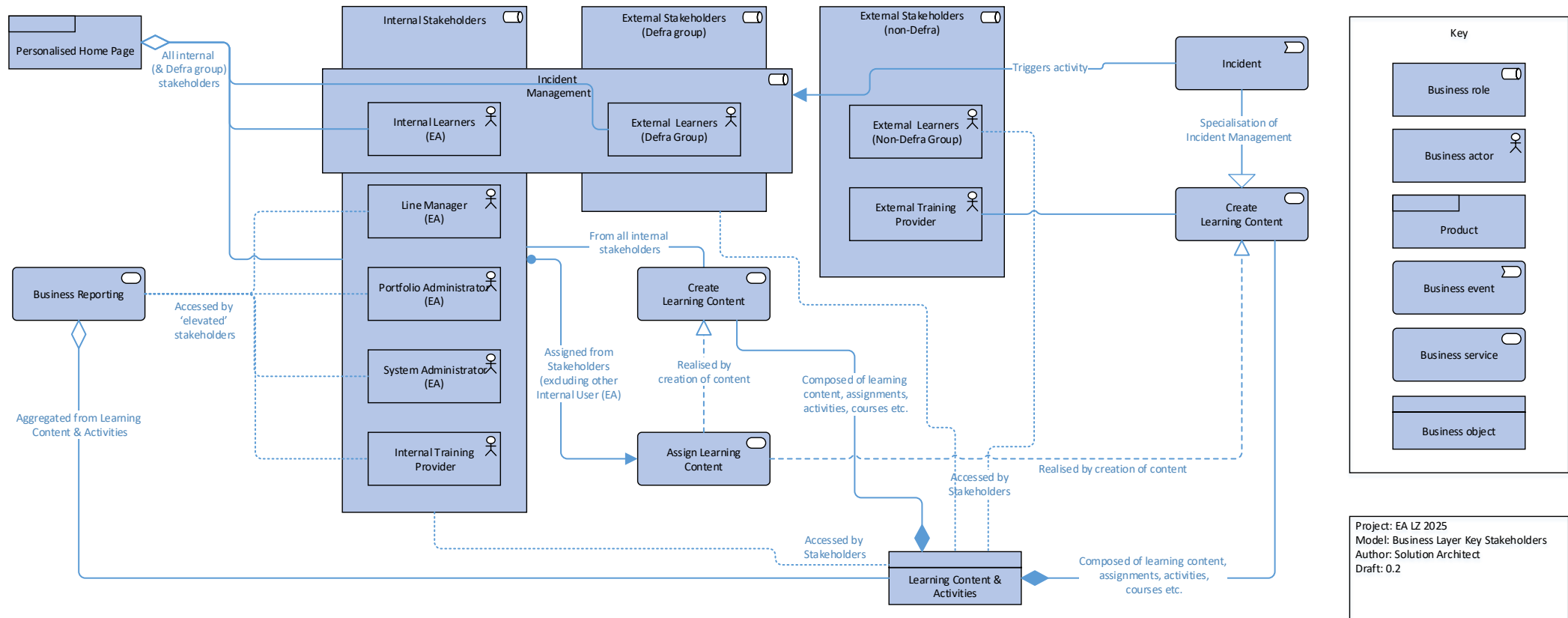
1. 8   Supporting Narrative

The following narrative describes the diagram, and to help reference requirements that that have been defined and will continue to be refined.

1. 9   Business Roles

- There are three core stakeholder groups that will use the solution;

    a) Internal Stakeholders;

    b) External Stakeholders (Defra group);

    c) External Stakeholders (non-Defra).

- Within each stakeholder group, there are role types, who perform business roles, respond to business events, provide business services and generate or respond to business products, and objects, as follows.

a. Internal Stakeholders

- Internal Stakeholders defined as Environment Agency (EA), employed by the EA.

b. External Stakeholders (Defra group)

- Stakeholders defined as those employed within wider Defra but outside of the EA.

c. External Stakeholders (non-Defra)

- Stakeholders defined as those employed for external third parties, who work in partnership with the EA, or where the EA has a strategy to develop capability in other government organisations where EA is recognised as the Government lead authority in a given area of expertise. Examples include Local Resilience Forums (LRF's) and Local Authorities (LA).

1. 10   Actors performing Business Roles

- There are multiple actor types within the business roles defined. An actor type is essentially a person who performs that business role. It is noted that an individual person can perform a single business role or multiple business roles;

- An example of an actor (person) fulfilling multiple roles would be where they perform their 'regular day job' and additionally perform business roles for secondary or multiple other roles, like they may have an accountability for performing a business role during an EA incident that is outside of their regular day job;

- Actors who perform more than one business role will require access to learning content for each of the role types they perform, which may be discreet and tailored for each of those business roles.

1. 11 Actor types: Internal Stakeholders

a. Internal Learners

- Internal Learners will be any person employed by the EA who performs a business role and completes training;

- An internal learner is a generic term covering all actors employed by the EA;

- Most internal learners will be actors performing their regular day job and / or other business roles;

- Internal learners could also include line managers, senior managers and deputy directors, administrators or indeed anybody who performs training (any actor who undertakes training is learning).

b. Line Manager

- In addition to being an internal learner, an actor who is designated as a line manager will have some additional accountabilities;

- There are functional requirements stipulated that are specific to line managers, over and above that of an internal leaner;

- E.g. a line manager has the ability to authorise training requests from an internal learner.

c. Portfolio Administrator

- In addition to being an internal learner, an actor who is designated as a portfolio administrator will have some additional accountabilities;

- There are functional requirements stipulated that are specific to portfolio administrators, over and above that of an internal learner;

- E.g. a portfolio administrator has the ability to create and manage manual bookings, approvals, booking of restricted content and report on attendance, using elevated privileges[2] to manage their portfolio[3].

d. System Administrator

- In addition to being an internal learner, an actor who is designated as a system administrator will have some additional accountabilities;

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[2] Elevated privileges will be required using an RBACs type schema that will manage privileged access levels against the business roles that are being performed (Role Based Access Control (RBAC))
[3] A portfolio will be a range of business services and / or accountabilities the actor holds for a work area within the EA

- There are functional requirements stipulated that are specific to system administrators, over and above that of an internal leaner;

- E.g. a system administrator has administration rights to oversee all functions and aspects of the solution, across all stakeholders using elevated privileges[4] that will enable them to effectively control the solution at the highest access level;

- It is anticipated the number of system administrator will be limited and restricted in number, in accordance with business and security posture rules.

e. Internal Training Provider

- Internal Training Providers will be any person employed by the EA who performs a business role such as a 'training delivery lead'[5] within an area or directorate of the EA;

- The Internal Training Provider is able to deliver training for their area or directorate within EA according to the access rights assigned for that business role;

- They will manage and administer their specific course content, communicate with delegates, add joining instructions for webinars, upload course materials in advance, view / mark completion of prerequisites, pre-course and post-course activities, and mark attendance directly into the solution.[6]

1. 12 Actor types: External Stakeholders (Defra group)

a. External Learners (Defra group)

- External Learners (Defra group) will be any person employed by the wider Defra group who perform an EA business role (or supports ALB's) and complete training associated with that role; or have common work areas where resources can be shared once across the group.

- This will usually be an additional business role, over and above their Defra regular day job, e.g. a Defra Communications actor may perform business role within EA Incident Management;

- The External Learner (Defra group) is able to access specified content, book courses, undertake training, and cancel courses according to access rights assigned and the role they are performing.

1. 13 Actor types: External Stakeholders (Non-Defra group)

a. External Learners (Non- Defra group)

- External Learners (Non- Defra group) will be any person outside of the EA or wider Defra group who work alongside EA to deliver work in partnership. This could be undertaking an EA

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[4] Elevated privileges will be required using an RBACs type schema that will manage privileged access levels against the business roles that are being performed (Role Based Access Control (RBAC))
[5] Noting this is a descriptor, not necessarily a role title
[6] These are examples of such activities, not an exhaustive list of all activities

business role or where there are benefits to enable working collaboratively by having a shared understanding of key subject areas; Examples of this include (but not limited to) external incident responders and the EA supply chain.

- This will usually be an additional business role, specific to a particular event or incident or a major flood defence construction project;

- Examples of these actors would include members of the Emergency Services, Local Flood Resilience Authority and External contractors (supply chain) who will be able to access specified content to facilitate their role as an Environment Agency partner;

- Further examples may include proposed new joiners[7] to the EA, for whom it would be advantageous to enable access prior to joining in preparation for their commencement;

- The External Learner (Non-Defra group) is able to access specified content, book courses, undertake training, and cancel courses according to access rights assigned and the role they are performing;

- The access rights associated with these actors are likely to be minimal and allow read only access to certain content such as e-Learning, videos, recorded presentations and other limited learning content.

b. *External Training Providers (Non- Defra group)*

      i. *Noting that an incumbent Third-Party external provider currently provides a service to manage delivery of training events and course pages;*

- External Training Providers will be organisations and training companies for whom a contract exists with the EA and / or Defra to supply training for any person employed by the EA;

- The External Training Provider will require access to view only content that is relevant to the subject matter area they provide training on or to provide and manage content or links to their materials;

- This will be agreed with EA contract managers or a portfolio administrator.

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[7] For example, those who are joining the EA following an accepted offer of employment but are subject to a notice period elsewhere

1. 14 Architecture Overview

The overview of the As-Is solution is described within this document already, and in requirements terms. This section is intended to outline for clarity, some of the key elements of the environment that will need to be considered in conjunction with the requirements, the motivation and the stakeholder viewpoints.

There are inflight programmes across the wider organisation, some of which are longer term, referenced here for information purposes:

- Enterprise Resource Planning (ERP) Programme across the Defra group;

- End User Computing Programme migrating to Win10, with specific browsers across the Defra group;

- Incident Management Roster tool and solution refresh within the Environment Agency;

- Virtual Private Network migration to Zscaler across the Defra group.

Specific to the As-Is solution, there are a number of key elements referenced here for information purposes:

- The As-Is solution is provided from within a multi-vendor environment, that requires the close partnership / interfacing of key suppliers, notably around the way that people account data feeds currently occur between source systems, to retain Single Sign On (SSO) capability;

- The As-Is solution is currently the cloud based 'Totara' product;

- SSO authentication is handled through MS Azure AD, with ADFS utilised for the LZ solution;

- External access for stakeholders (see section relating to stakeholder user base in this documents) is required for a range of actors and business roles across the Environment Agency, the wider Defra group and External third parties;

- Currently elevated privileges are limited and based on roles performed within the As-Is solution, which is required to continue through the new solution, within a regimen of Role Based Access Controls (RBAC);

- An incumbent external third party currently provides learning administration, scheduling and management services within the Environment Agency.

1. 15 *Architecture Motivation Viewpoint*

This section depicts and describes the Architecture Motivation Extension Model defined to provide a business viewpoint of the solution.

The following diagram is simplified into colour coded themes for the purposes of following the subsequent narrative descriptions and is not intended to represent an exhaustive content key.

1. 16 Architecture Motivation Viewpoint Diagrammatic Model
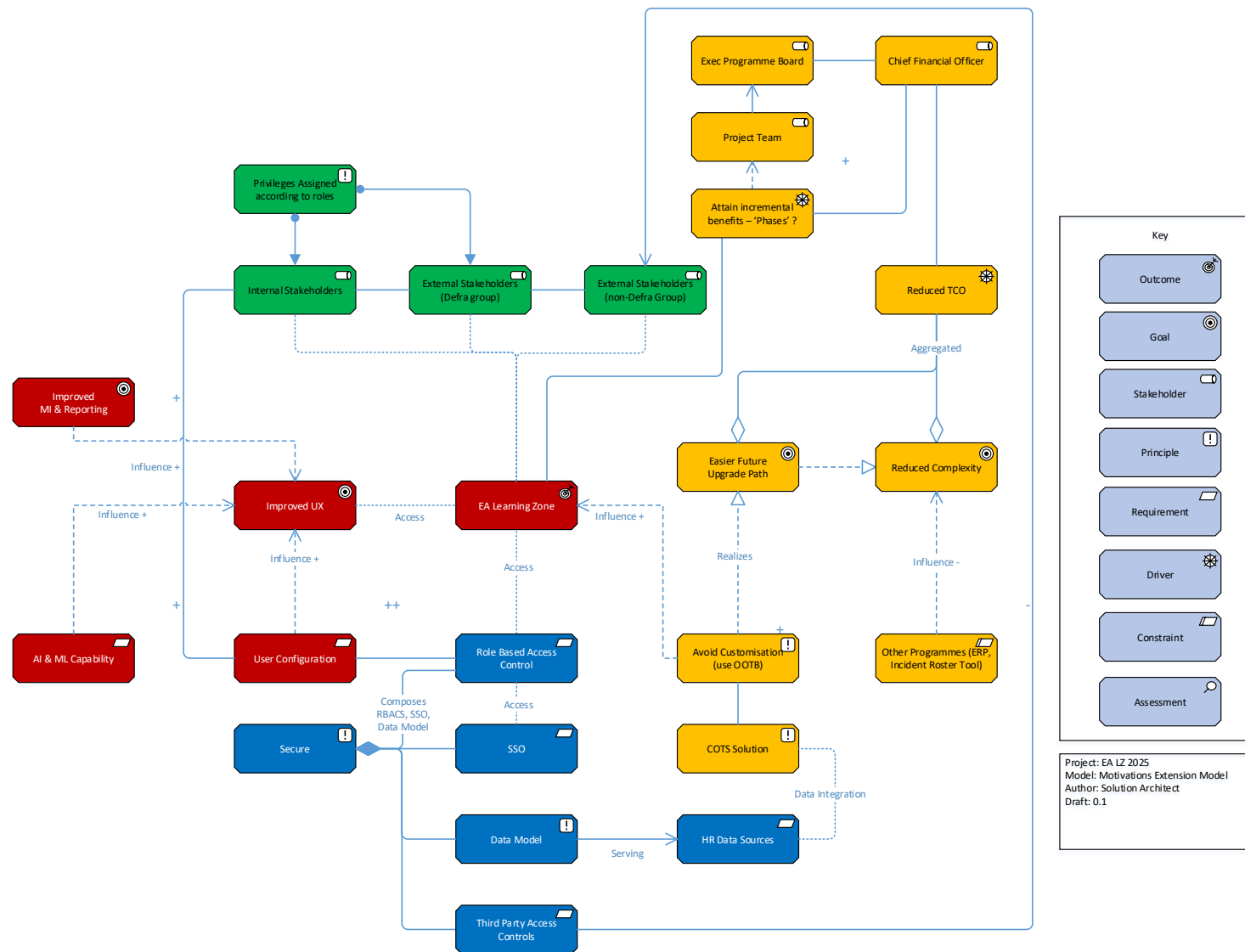
1. 17 *Architecture Motivation Viewpoint Diagram Narrative* [8]

The following narrative describes the diagram, according to the simplified corresponding colour coded components. The colour coding is not intended to represent a component content key. It is a 'signpost' to link the narrative in this sub-section to the appropriate section of the diagram.

> This section corresponds to the section of the diagram whose components are in this colour

Outcome:

- Provide a replacement 'EA Learning Zone' solution that accommodates the different stakeholder requirements, positively influenced by the following goals.

Goals:

- Improve User Experience (UX), which is;

  o Positively influenced by the goal to improve MI & Reporting, including reporting by learners who should be able to access content that supports development of their competency in their role[9];

  o Positively influenced by the requirement to enable stakeholders to configure their own homepage and user screens;

  o Positively influenced by the requirement to use AI[10] / ML to help stakeholders manage their planned learning activities, their preferences, their previous activities, to view suggestions based on activities of similar stakeholder types etc.

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[8] Noting that architecture model definition is contained within the appendices of this document
[9] As captured within requirements
[10] Artificial Intelligence and Machine Learning, defined within definitions

> This section corresponds to the section of the diagram whose components are in this colour

Principles:

- Core principle to provide a COTS solution, associated with;

- Core principle to avoid major customisation by taking Out of The Box (OOTB) components;

- These principles will positively influence the outcome of the EA Learning Zone overall and will help realise the following goals.

Goals:

- Provide an easier and more predictable, road-mapped upgrade path that maintains the integrity of the solution longer term;

- Reduces complexity, which in turn both aggregate to;

  o Support driver of reduced Total Cost of Ownership (TCO).

- The goal to reduce complexity may be negatively influenced by other programmes with competing aspirations, timelines, or resource requirements.

Drivers:

- Reduced TCO will satisfy the Stakeholders;

  o Chief Financial Officer (CFO), Executive Programme Board and the Project Team;

- Reduced TCO will be associated with the potential driver to attain incremental benefits through a phased delivery approach, which in turn will positively influence the stakeholders;

Stakeholders:

- Project Team, serving the Executive Programme Board, associated with the CFO.

This section corresponds to the section of the diagram whose components are in this colour

Principles:

- Core principle to deliver a secure solution will be achieved through a composition of elements, including;

- Core Principle to define a data model that agrees data entities, attributes, sources and integrations, into;

    o Requirement to source master 'people' data from existing HR Data Sources.

- The secure solution core principle is composed of further requirements;

Requirements:

- Requirement to utilise Single Sign On (SSO) for users within the core network;

- Role Based Access Controls (RBAC) to assign appropriate privileges to stakeholders;

- Provide Third Party Access Controls in a way that maintains the integrity of the solution.

This section corresponds to the section of the diagram whose components are in this colour

Principle:

- Core principle to assign privileges according to roles is underpinned by the principle to provide a secure solution, and will see the assignment of privileges to 'user' stakeholders with access to the solution;

Stakeholders:

- Internal stakeholders within the Environment Agency (EA);

- Stakeholders external to the EA but within the Defra group;

- Stakeholders external to the Defra group, served by Third Party Access Controls.

1. 18 High Level Requirements

Unique ref Identifier	Theme	Functional Type	RFI Requirement Statement	Priority Rating
FR - PR - 001	Principle	COTS	The Solution will be a commercial off-the-shelf (COTS) product. Customisations must be minimal to assure that future operability and maintainability is not compromised.	Must
FR - PR - 002	Principle	Modular Solution	The Solution will provide the required functionality through a common single point of entry.	Must
FR - PR - 003	Principle	Stakeholders	The Solution will provide service for in scope stakeholders, appropriate to their roles and functional types, in accordance with both security requirements outlined, and, the privileges required to perform their roles. Note: Stakeholders and their functional types (e.g. Internal Learners, External Learners, Line Managers etc.) are further defined within the RFI document.	Must
FR - PR - 004	Principle	Data Integration	The Solution will provide automated data integration with existing sources. Note: it is expected the approach used will define a data model, data entities, types, attributes, sources and then provide automated integration opportunities to remove existing manual uploads / interventions.	Must
FR - PR - 005	Principle	Audit Log	The Solution will provide an audit log of date and time stamped activities, with access to the content of communications, for example.	Must
FR - PR - 006	Principle	User Experience	As a Learner the User Experience will be that I find the Solution intuitive, engaging, easy to use and to navigate.	Must

1. 19 Functional Requirements

The Functional Requirements for the proposed solution are subject to change and refinement following the RFI process and indeed it is intended that the RFI process will help inform and shape these requirements further.

The MS Excel (.xls) attachment containing the initial FRs are contained within the appendix of this document.

Please populate and indicate the following within each row against the requirements within the MS Excel file, using the key table outlined within the Section 'Appendix B' of this document:

- Compliance Status;

- Compliance Commentary.

1. 20 Non-Functional Requirements (NFRs)

The Non-Functional Requirements for the proposed solution are subject to change and refinement following the RFI process and indeed it is intended that the RFI process will help inform and shape these requirements further.

The MS Excel (.xls) attachment containing the initial NFRs are contained within the appendix of this document.

Please populate and indicate the following within each row against the requirements within the MS Excel file, using the key table outlined within the Section 'Appendix B' of this document:

- Compliance Status;

- Compliance Commentary.

1. 21 Security Requirements

The Security requirements will form the basis of Security Assurance reviews for any solution that is proposed and are therefore included here for early reference purposes.

The MS Excel (.xls) attachment containing the initial requirements are contained within the appendix of this document.

Please populate and indicate the following within each row against the requirements within the MS Excel file, using the key table outlined within the Section 'Appendix B' of this document:

- Compliance Status;

- Compliance Commentary.

Section 2: INSTRUCTIONS

This Part sets out instructions regarding submission of responses to this RFI.

2. 1   RFI key dates

The following key dates apply to this RFI:

RFI Issue Date	Mon 15/03/21 at 9.00 am
Date of Supplier Demonstrations	Thu 15/04/21 to Wed 28/04/21
Dates for Supplier RFI Questions	Thu 11/03/21 to Wed 24/03/21
RFI Closing Date and Time	Thu 01/04/21 at 17:00 pm

2. 2   Authority contact

The following individual is the nominated Authority contact for this RFI.

Name	Tim Carter
Title/Position	DEFRA Commercial Manager Lead Projects
Telephone	07858 991260
Email address	tim.carter@defra.gov.uk
Postal address	DEFRA **Nobel House,** 17 Smith Square. London SW1P 3JR.

2. 3   Queries and questions during the RFI period

Suppliers are to direct any queries and questions regarding the RFI content or process to the Authority contact during the dates specified in table 2.1 above. All questions should be submitted in writing by email to the nominated email address with the subject title: LZ 2025 RFI Questions . The Authority may choose to convey responses to submitted questions and queries to all suppliers so that each is equally informed.

2. 4   Opportunity Demonstrations

The Authority will hold Demonstration sessions by some selected suppliers between the dates specified in section 2.1. A maximum of three representatives from each supplier is permitted to attend the RFI Demonstration MS Teams session and any (site visit) that may take place. Further details regarding the RFI demonstration session will be provided to suppliers later during the RFI phase.

2. 5   Response lodgement methods and requirements

Suppliers must submit copies of their response to the Authority in the following method:

a)   By email to: tim.carter@defra.gov.uk. The subject heading of the email shall be RFI The Learning Zone: 2025: Project: LZ2025

b)   The RFI title is: RFI The Learning Zone: 2025: Project: LZ22025 **[Supplier Name]**. Electronic copies are to be submitted in PDF and native (e.g. MS Word or Excel) format and suppliers may submit multiple emails (suitably annotated – e.g. Email 1 of 3) if attached files are deemed too large to suit a single email transmission. 5MB is the capped file allowed

2. 6   Late responses

Suppliers are responsible for submitting their response prior to the RFI closing date and time in accordance with the acceptable lodgement requirements described in Clause 2. 5. There will be no allowance made by Authority for any delays in transmission of the response from supplier to Authority. Any Proposal received by the Authority later than the stipulated RFI closing date and time may be removed from further consideration by the Authority.

2. 7   Suppliers to inform themselves

Authority has taken all reasonable care to ensure that the RFI is accurate; however, the Authority gives no representation or warranty as to the accuracy or sufficiency of the contained information.

2. 8   Costs of preparing the response

All costs relating to the preparation and submission of a response are the sole responsibility of the supplier. Authority shall not pay the supplier, wholly or in part, for its response.

2. 9   Confidentiality

Except as required for the preparation of a proposal, suppliers must not, without Authority's prior written consent, disclose to any third party any of the contents of the RFI documents. Suppliers must ensure that their employees, consultants and agents also are bound and comply with this condition of confidentiality.

2. 10   Acceptance of these Conditions

Suppliers, by submitting a response to this RFI, are deemed to have acknowledged and agreed to the conditions set out in this RFI.

Section 3: INFORMATION TO BE PROVIDED

This Part details all the information suppliers are required to provide to the Authority. Submitted information will be used by the Authority as set out in section 1. 3. The following minimum information is to be provided. If this information, or any additional information, is available on your website please provide the address to enable the Authority to undertake further analysis.

3. 1   Supplier details

a)   Supplier name (Trading and Registered), ABN, registered address.

b)   Details of supplier operations and operating locations.

c)   Supplier ownership information, including details of Directors and other key office bearers.

d)   Relationships with any parent Authority (if applicable).

e)   Details of the Prime and secondary supplier arrangements suggested for this solution (if applicable)

f)   Details of when the supplier organisation was founded, including origins and historical development of the organisation (if needed).

g)   Total number of employees.

3. 2   Supplier capabilities and experience

a)   A description of the core supplier business, listing relevant case studies or examples (a maximum of three) that support this description. Where possible, include case studies that may relate to activities relevant with the proposed solution. Within necessary boundaries of confidentiality, please be as specific as you can.

b)   Additional services, products and works provided outside of your core business.

c)   Examples (if any) of services that supplier has provided to Authority including the name of the Authority representative/s concerned.

d)   Details of key health and safety, environmental, sustainability, Equality Diversity Inclusion and other performance measures.

3. 3   Supplier financials

a) Details of held insurances relevant to the Solution.

b) Supplier market share in terms of turnover, revenue and volume output.

c) Details of potential funding arrangements, lines of credit etc. to support investment in the Solution (if relevant).

3. 4   Certifications and awards

a) Details of all certifications held (e.g. ISO 9001) including date of last certification/recertification and details of the certifying body (copies of certifications may be appended to your response).

b) Details of any recent external corporate awards, including the awarding body, if relevant to the Opportunity.

3. 5   Policies

a) Details of all major supplier policies, including Health and Safety, Environmental/ Sustainability, Employee Relations and Local Participation. Copies of policies are to be appended to your response

3. 6   Questions

a) Please complete the following RFI questions. G*uidance is provided to assist the responder when answering this question and is in no way intended to provide an exclusive, exhaustive or definitive list of the areas to cover. Responder to delete these guidance notes when completing, as necessary.*

Questions	Suppliers response (Maximum 500 words)[11]
Provide details of your previous experience in the supply and support of your solution, including relevant case studies where possible,	• *Can include a maximum of three PDF case studies, no more than two pages in length; these can be additional to the 500 word limit*

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[11] This is a maximum word count and not a target

preferably within the public sector or, if not, in private sector that satisfies the requirements.	• *Explain whether these are within Government / public sector or private sector; if private sector, describe how this is relevant / transferable*
Describe the core functions of the solution, and how you structure the software you provide to meet the requirements.	• *Outline the key principles of the solution* • *Describe how the overall solution is structured; e.g. is this a single SaaS application, or is it comprised of multiple applications / modules*
Please further describe how you have previously worked in a multi-vendor environment, and how your support model will integrate[12]	• *Provide recent relevant examples (can be anonymised)* • *Describe how you worked with others (charters, formal contracts, working practices etc.)* • *Highlight successes and challenges of your approach* • *Demonstrate where innovation and / or continuous improvement was utilised*
Please provide details of your solution implementation / delivery approach process including your integration phases and how you will meet these, e.g. how you would typically deliver through phased or gated processes, including indicative timescales[13]	• *Please describe relevant examples of how you have worked with clients to deliver the solution* • *Provide indicative timescales for similar sized organisations where you have delivered the solution* • *Please describe you preferred project methodology*
Please describe the methodology / approach that you undertake to migrate existing learning content and relevant learner data from an incumbent solution.[14]	• *Please describe how you would migrate existing learning content (e.g. existing learning courseware) and learner data, for similar sized organisations*
Based on the requirements please highlight any unique functions or characteristics that your solution can deliver or may have on your roadmap, in order to help further refine our requirements, including for example AI & ML capabilities, Capability, Competencies.	• *Describe any other unique functions or characteristics that your solution provides today, or are planned for the future* • *Provide examples of Artificial Intelligence & Machine Learning (AI & ML) capabilities*

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[12] It is important to explain how your organisation works with other vendors
[13] Noting this may also be covered within existing case studies provided
[14] Assuming that the incumbent solution is cloud based

3. 7   Indicative Pricing

a) Details of indicative rates and prices to supply the Solution must be populated in the following table. Please note/highlight any assumptions including details of any software volume bands driving discount levels and any concurrent user constraints that support these calculations. A copy of this table will be attached in spreadsheet format to the RFI for you to populate

LZ 2025 Indicative Costs							
Supplier Recurring Costs	Opex	21/22	22/23	24/25	25/26	Total	
Software	licences					£0	
Hosting	Service					£0	
Support	service					£0	
Security	service					£0	
Totals			£0	£0	£0	£0	£0
Supplier Non Recurring Costs	Capex	21/22	22/23	24/25	25/26	Total	
PI Phase	service					£0	
Implementation Phase	service					£0	
Integrations	service					£0	
UAT	service					£0	
Training	service					£0	
Totals			£0	£0	£0	£0	£0
Grand Totals			£0	£0	£0	£0	£0

3. 8   Other Information

a)   Any further information you believe the Authority may require in support of its RFI review activities.

Appendix A: DEFINITIONS

The following are architecture definitions are those used within the Architecture Motivation Section (Section 1.15).

Concept	Definition
Outcome	The architecture end state, comprising of concepts defined.
Goal	An end state that the stakeholder intends to achieve.
Stakeholder	Role of individuals, teams, organisations that represent their interests in, or concerns relative to, the outcome of the architecture.[15]
Principle	A normative property of all systems in a given context, and / or the way that they are realised in order to achieve the architecture outcome.
Requirement	A statement of need that is to be realised by the architecture.[16]
Driver	Something that creates, motivates and fuels change within an organisation.
Constraint	A restriction on the way in which an architecture outcome is realised.

RFI Functional requirements key	
Unique ref Identifier	This standard convention has been agreed within the project to provide consistency for requirements definition, refinement and traceability. The convention consists of three components; a two or three character alpha Requirement Type, e.g. Functional Requirement (FR), Non-Functional Requirement (NFR) and Security Requirement (SEC), a two or three alpha character Theme, and a three character numeric number starting from 001. Example 'FR – PR – 001'.
Theme	Functional Theme areas of the solution using standard naming convention
Functional Type	Functional types within the theme areas of the solution, using naming convention standards that support simplified sorting and analysis

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[15] Please refer to Business Layer Key Stakeholder for further definition
[16] Business requirements have been defined for the solution

RFI Requirement Statement	Requirement description intended to provide further detail and context
Priority Rating	MoSCoW using standard ratings of Must, Should, Could & Won't

Term	Description
Principles	Key foundations of the solution which sit above all other Requirements and are represented as Architecture Motivations of the solution
Solution	Environment Agency (EA) Learning Zone
COTS	Commercial off-the-shelf
Modular Solution	Solution which consists of associated modules that can be accessed according to Stakeholder type and privilege levels, accessed via single point of entry
Data Integration	Data Integration required with existing sources within the Environment Agency (EA) to increase automation and reduce manual data processes, particularly pertinent to the regular or routine movement of data
Audit Log	Audit log of date and time within the solution to meet data retention requirements
AI	Automated Intelligence provides an automation to the thinking around certain repeatable tasks, and uses a subset referred to as Machine Learning (ML) to identify previous patterns of use, preferences and other quantifying information to provide users with a richer targeted user experience
Access Control	Accessing the solution via the standard Defra security protocols (e.g. authenticated SSO via the AD solution)
Stakeholders	Key business users of the solution that are broken into three over types, containing actors, who perform business roles. This is captured within the Business Layer Stakeholder architecture section (Section 1.11).
EA	Environment Agency
Defra	Department for Environment, Food & Rural Affairs

Defra group	External to the EA
Non-Defra group	External to Defra & EA
IM	Incident Management
Additional Profiles	Incident Management (IM) users can have multiple roles attached to their role profile within the solution
Incident Manager	Role of Incident Management (IM)
Homepage	Landing zone of a Learner
Dashboard	Learners Dashboard within the solution which can be customised e.g. preferences
Learners	Key Learners (actors) from within the three core Stakeholder groups identified
Learning Plan	Learners Annual Plan for Performance review with Line Manager
Learning Pathway	Learning pathways specific to the learner e.g. career progression, personal development
Learning Management	Functionality driven/managed by the Learner e.g. activity such as join events/course, create content, notifications etc
Learning Resources	Learner repository so they can access courses (face-face or virtual), course material etc.
Learning Schedule	Learner can schedule activity as per their preferences e.g. content due date, an activity
Social Learning	Sharing of learning knowledge/experiences via professional social media outlets (e.g. MS Teams, Yammer, LinkedIn etc.).
MI	Management Information
Learning Directory	Enables Learners to manage content
UX	User Experience
JML	Joiner (e.g. new starter), Mover (e.g. move job role, or attain promotion to another grade within the same job family with different / additional accountabilities), Leaver (e.g. leaves organisation)
WOW	Ways of Working
RFI	Request for Information

SSO	Single Sign On, using MS Azure AD
API	Application Programme Interface, standard software integration standard
TDF	Technical Development Framework
Vendors	Supplier of the solution or system integrators
SFIA	Skills Framework for the Information Age
GDPR	General Data Protection Regulations, May 2018
APP	Application (Learners access via an application on a smartphone / tablet etc.)

Appendix B: REQUIREMENTS

The following MS Excel file (.xls) contains the requirements that were referenced within Sections 1.19, 1.20 and 1.21.

A separate version of this will be included with this RFI document with the appropriate cells unlocked for your response to be added.

Please state and describe your compliance against each row within the .xls according to the guidance outlined within the following table.

Requirements Compliance Key:

	Status	Commentary Guidance
C	Compliant	Confirm that your solution is compliant and describe how it complies with the requirement, e.g. out of the box feature.
P	Partially Compliant	Explain what elements of the requirement comply and describe how that element complies with the requirement. Explain non-compliant elements and explain if they are roadmap items, tactical development items, strategic items or will not be compliant going forward.
N	Non-Compliant	Explain whether this is likely to be a roadmap, tactical development or strategic item, or confirm that it will not be compliant going forward.

RFI Appendix B:
Master Requirements
Catalogue

Appendix C: INDICATIVE PRICING SPREADSHEET

LZ 2025 RFI
Indicative Costs.xlsx