

Procedure for hiring an external Contractor to scope, develop, deploy, host and maintain a learning management system

Call for tenders

Terms of Reference

On behalf of the Interact Programme, Interact Office Viborg is inviting interested experts to submit a quotation for a short-term contract to scope, develop, deploy, host and maintain a learning management system and its associated front end and back end functionalities.

In order to respond to this call for tenders, interested experts must demonstrate their experience, capacity and suggested approach to carrying out the assignment in view of the specification presented in this Terms of Reference.

Background

About the Interact Programme

The Interact Programme is a cooperation programme under the European Territorial Cooperation (ETC) objective of the Cohesion Policy 2021-2027 – known as **Interreg** and is co-financed by the European Regional Development Fund (ERDF).

The Interact Programme provides exchange of experience, information and innovation, in order to promote best practices and make cooperation easier. The programme delivers this through targeted events, publications and tools.

Further information and relevant documents concerning the Interact Programme can be found on the programme website: www.interact-eu.net.

About Interreg

Interreg is one of the key instruments of the European Union (EU) that supports cooperation. It consists of about 100 programmes, all of whom fund projects. To get their projects funded by Interreg, public institutions and SMEs need to gather a number of partners from different regions in various countries. The specific rules that apply to the number of partners and countries of origin involved depend on each specific programme.

Projects funded by Interreg aim to tackle common challenges and find shared solutions to these challenges in fields such as health, environment, research, education, transport, sustainable energy and more.

The assignment

Purpose of the assignment and target groups

Interact has been training staff of Interreg programmes for 21 years using a variety of online and offline methods.

Now it seeks to increase the offer with the addition of training programmes. Each training programme will offer a unique mix of elements to provide a coherent learning experience that can be offered to a number of cohorts in a recurrent manner. They will target people working for other Interreg programmes, particularly those who are new to Interreg or to their role in an Interreg programme.

The purpose of the assignment is to scope, develop, deploy, host and maintain an online learning management system that will:

- allow Interact to design, execute and monitor a new offering of training programmes, from a user-friendly Content Management System.
- integrate or rebuild all the existing functions of Interact's current online learning platform (see here: <https://learning.interact-eu.net/>).

Objectives and content of the assignment

The objective of the assignment is to scope, develop, deploy, host and maintain a **learning management system** for Interact.

The assignment is separated in four phases, as described in Annex 1 and below. The Contractor shall start this assignment with a discovery phase (phase 1), as described in Annex 1, to review and complete the initial list of functionalities included below and in Annex 2 as needed, based on Interact's needs expressed during workshops, interviews or other similar methods put in place by the Contractor.

The Contractor will then conduct in-depth technical research to propose the most cost-effective way to build the platform. This could be either adapting the existing online learning platform (<https://learning.interact-eu.net/>) or building a new one. The Contractor will provide the necessary elements for Interact to be able to decide the best option to develop in the subsequent phases of the project. As described in annex 1, the final object of phase 1 is that the Contractor provides a detailed proposal for a solution with a fixed price for the development and deployment of this solution (phase 2).

The resulting platform shall include a publicly available front end (URL expected to be www.interactacademy.eu), as well as its back end and its associated versions dependent on users and user rights.

The Contractor shall integrate or rebuild Interact's existing online learning platform on a new online learning management system and provide access to its back end for training developers that will support the development of online courses as well as the design, development and execution of training programmes. In addition to this, the online learning management system shall provide a section "my page" to learners enrolled in training programmes or online courses where they can get an overview of their courses, assignments due, and other relevant

information. This should be completed by a publicly accessible website displaying information such as, but not limited to, calendar of courses/training programmes, overview of courses/training programmes, call to action ("register here" or "learn more", for example), contact information, etc. The final elements to be found on the online platform will be agreed with Interact during development.

Finally, this online platform shall also have a monitoring module for statistical purposes, and be able to provide data on predefined reports, such as but not limited to, number of training programmes, number of enrolled learners, overview of type of modules, overview of completion per learner, completion rate per year and per training programme, etc.

This platform must, as a minimum:

- be a web-based solution
- have a user management system (expected max. 50 users at this point on the Interact backend, 5000 learners/enrolled), including an authentication protocol. The system must also have adequate security as some personal data will be part of the data sets. It is expected that the authentication can be synchronized with Interact's contact management system through a single sign on solution (SSO).
- provide a registration form, to be used when creating the learning cohorts for each training programme.
- integrate or rebuild all the existing functions of the existing platform www.learning.interact-eu.net into the new online platform and update its functionalities and UX/UI as needed.
- have a monitoring module/dashboard
- dynamically update data in real time in the monitoring module.
- create data overviews/reports (single or multidimensional) in a visual manner (graphs, maps, etc.) in the monitoring module.
- allow for running queries on the data available, predefined
- allow export of the visuals (pdf or other image format) as well as table/database queries (Excel)
- have a training programme design module
- allow for designing training programmes on a modular basis by selecting various predefined components (a list of these components is available in Annex 2).
- allow for defining a timeline per training programme
- allow for repeating a given training programme on a given time frame (e.g. twice a year)
- allow for replicating a training programme and editing it to create a new training programme
- integrate blockers at predefined milestones of a training programme (e.g. access to module 2 or next event only possible if module 1 or first event has been validated).
- create a validation function for course designers/trainers. Where possible, enable automated validation.
- generate certificates of completion on successful completion of a training programme
- generate certificates of participation on successful completion of an online course
- have a dynamic search function to allow for text search throughout the tool
- have a responsive web design
- be in line with the *Interact IV Brand Design Manual*, see Annex 4
- provide an easy-to-follow, intuitive logic in both back end and front end, for both learners and training programme designers
- allow for easy further developments, such as inclusion of additional components in training programme design, development of new queries, development of new visuals, etc.

- integrate a calendar function with automated synchronization between backend and front end.
- have an evaluation module
- allow for the creation of surveys for evaluation of a training programme post-completion.
- allow for aggregating the data harvested through the evaluations
- allow for exporting the aggregated data in Excel or PDF format
- allow for of transfer information to other Interact tools via API (e.g. information about number of completed training programmes)
- be accompanied by documentation and a user manual
- include communication features for the trainer to send direct messages to individual learners and to the whole cohort, as well as a space for the trainer and the whole cohort to exchange (e.g. a discussion forum).
- allow users to subscribe to receive automatic notifications based on their selection (when a new training programme of a particular theme is published, when a new cohort of a particular training program opens its registration, etc.

In addition to these bullet points, the selected bidder shall also take into consideration the functionalities listed in Annex 2 and the requirements listed in annex 1 to be fulfilled during this project.

Further information about the expected user journeys and Interacts brand design can be found in annex 3 and annex 4.

When the development of the solution is completed, phase 3 (Operations and maintenance) starts as described in annex 1. When the Contractor is hosting and maintaining the solution, the Contractor be processing data on behalf of Interact, and the Contractor must therefore be in compliance with the GDPR and the data processing agreement (annex 5) shall be an integrated part of the agreement between the parties.

Working language

The working language for the exchanges between Interact and the successful bidder will be English. All deliverables will also be delivered in English.

Timeframe and scope of work

Selection procedure:

11/05/2023 (at noon, CET): Deadline for bidders to submit proposals.

18/05/2023: Interact to notify bidders about the outcome of the selection procedure. No information will be provided before that date as regards the status of the evaluation of offers.

Delivery of work:

The project will be delivered in the following phases:

- Phase 1: Discovery and solution design
- Phase 2: Development and deployment
- Phase 3: Operations and maintenance, including any further developments needed and hosting
- Phase 4: Closure

The project will include the following milestones:

- 22/05/2023 or 26/05/2023: Inception meeting (in-situ or online) between Interact and the successful bidder. In this meeting, Interact and the successful bidder will discuss the details of phase 1 to be included in the contract (the contract shall be finalised as soon as possible after the meeting, in order to start the project)
- 16/06/2023: Delivery of final deliverables of phase 1: Discovery and solution design
- 15/09/2023: Publication of platform online

Selection procedure

When and how to submit your offer

Offers should be sent in English and by email only to Eva Martínez Orosa (eva.martinez@interact-eu.net) by 11/05/2023 at noon (CET) at the latest. Offers received after this deadline will not be considered.

Please note that any expenses you incur in the preparation of your offer will not be reimbursed.

What to include in your offer

Please send an email, briefly explaining why you are interested in this contract and what makes you/your company the ideal candidate for this job. Please attach:

- A proposed initial Concept Note for the delivery of the tasks, including the methodology to be used, milestones, and clearly indicating the members of the team delivering different tasks.
- A CV of each of the members of the team that would be delivering the work, including samples of previous work similar to the task detailed in this contract.
- References to previous similar projects conducted by the company. We will value higher references to previous projects that are online learning platforms with features similar to those required for the current project. Please, specify the technology you have used for them. These should include the contact details of a person that Interact could get in touch with for further information.
- A financial proposal, indicating:
 - the total cost for all the tasks required to deliver in phase 1 of the project.
 - the price per hour for the team that will be involved in the delivery of the subsequent phases of the project (the bidder can only submit one price per hour)

All the material requested in Annex 1, in the column "Material to be submitted", shall be delivered and included in the offer.

The Contractor may, if preferable, submit a preliminary draft for a contract together with the offer. The final contract between Interact and the winning bidder will be set up and negotiated when the winning bidder has been selected. These terms of reference and the annexes shall be integrated into the final contract, and the total cost for phase 1 shall be stated as a fixed price for accomplishment of phase 1.

Interact has calculated on spending a **maximum** amount of **EUR 160 000** (excluding VAT) **for all 4 phases** of the project:

Phase 1: Discovery and solution design. Interact has calculated that this phase will take approximately 100 hours of work.

Phase 2: Development and deployment.

Phase 3: Operations and maintenance, including hosting and small developments needed in the platform until 2029.

Phase 4: Closure.

The majority of the budget shall be devoted to phases 2 and 3.

Selection criteria

The Contracting Authority intends to award the Contract to the supplier who has submitted the economically most advantageous tender evaluated in accordance with the award criterion best price-quality ratio and the sub-criteria mentioned below.

| Sub-criteria | Weighting (%) |
|------------------------|---------------|
| Economic | 40% |
| Quality and experience | 60% |

Overall description of the evaluation model:

For each tender the evaluation of the qualitative sub-criteria will take place in accordance with the below description using the following scoring scheme:

| Evaluation | Score |
|---|-------|
| Best possible fulfillment of the criterion | 0 |
| Excellent fulfillment of the criterion | 1 |
| Good/very satisfactory fulfillment of the criterion | 2 |
| Above average fulfillment of the criterion | 3 |
| Average/satisfactory fulfillment of the criterion | 4 |
| Below average fulfillment of the criterion | 5 |
| Less satisfactory fulfillment of the criterion | 6 |
| Inadequate fulfillment of the criterion | 7 |
| Poor fulfillment of the criterion | 8 |

A price-based evaluation model will be used for the final evaluation. Under a price-based evaluation model a deviation from the best possible fulfillment is considered an additional cost, and will be added to the tenderer’s overall tender price for the purpose of the evaluation. Thus, a **hypothetical** cost is added for the purpose of the evaluation for every point scored for the qualitative sub-criteria. The amount of that cost is determined on the basis of a conversion sum as described below. The calculation takes place as follows:

- A conversion sum is identified by dividing the average of the overall tender prices by 8 (the maximum score for the qualitative sub-criteria).
- For each qualitative sub-criterion the score (from 8 to 0) is multiplied by the conversion sum.
- That amount is then included in the overall evaluation price with the percentage stated for the sub-criterion in question.
- The overall tender price is included in the overall evaluation price with the percentage stated for the sub-criterion in question.
- The weighted prices/amounts for all sub-criteria are added and the tender with the lowest overall evaluation price is deemed the successful tender and is awarded a contract.

For the purpose of illustration, the table below contains an imaginary example of the use of the price-based evaluation model described above. In the example there are only two sub-criteria: economy with a weight of 40 % and quality with a weight of 60 %.

| Tenderers: | A | B | C |
|--------------------------------|--------------------|--------------------|--------------------|
| Overall tender price: | 1,000,000 kr. | 1,500,000 kr. | 500,000 kr. |
| Quality score: | 3 | 0.5 | 7 |
| Conversion sum: 125.000 kr. | | | |
| Converted quality price: | 375,000 kr. | 62,500 kr. | 875,000 kr. |
| Weighted quality price: | 225,000 kr. | 37,500 kr. | 525,000 kr. |
| Weighted overall tender price: | 400,000 kr. | 600,000 kr. | 200,000 kr. |
| Overall evaluation price: | 625,000 kr. | 637,500 kr. | 725,000 kr. |
| Rank: | 1 | 2 | 3 |

Description of the evaluation of the sub-criteria "Economic":

Economic is calculated as the sum of following costs stated in the offer:

- The total estimated cost for all the tasks required to deliver in phase 1 of the project.
- The price per hour multiplied with 1000 hours (this calculation with 1000 hours is a *fictitious* case for the purpose of evaluation only).

Description of the evaluation of the sub-criteria "Quality and experience":

Quality and Experience will be evaluated on the basis of the following parts from the offer:

- Proposed Concept Note.
- Relevance of previous experience of members of the proposed team.

- Relevance of previous experience of the company in similar projects.

In the evaluation of the above, Interact will assess the bidder's overall capabilities to succeed in all four phases of the project and the fulfilment of the requirements stated in these terms of reference and the annexes. The score is a judgment based on the collective assessment of the three above-mentioned bullets.

The winning bidder is the one whose evaluation-price, calculated as stated above, is the lowest. Should a contract not be signed, Interact can proceed to offer the contract to the second lowest offer.

Interact reserves the right to cancel the selection procedure, if none of the offers meets Interact's expectations on price or quality for the needed supplier. Further Interact reserves the right to reject offers that Interact assess will be too expensive in consideration of the budget for all four phases stated above, even if the offer has the lowest evaluation-price, in such case Interact can proceed to offer the contract to the second lowest offer.

Additional information

Questions about the content of these terms of reference should be sent by email to Eva Martínez Orosa (eva.martinez@interact-eu.net).

Please, note that questions received prior to the deadline for submission of tenders and the respective answers will be published on Interact's website in the tender section. These will be regularly updated when new questions are submitted.

After selection, a Contract will be set up with the successful bidder as described above. This contract will include details of payment arrangements and other terms and conditions, that is not mentioned in these terms of reference.

All related materials developed in the framework of this contract will be considered as work per hire and, as such, copyright will be transferred to Interact, who will then be free to use, edit and publish them. If the Contractor use standard software (or similar), developed by the Contractor or a third party outside the framework of this contract, in the solution developed to Interact in relation to this contract the copyright will not be transferred to Interact, however the Contractor must ensure that Interact acquires unlimited right to use the solution developed to Interact. All licenses needed in the framework of this project, including any third party licenses, shall be arranged for by the Contractor and included in the price.

Annexes:

Annex 1: Detailed requirement specifications

Annex 2: Preliminary functionalities and components. These will be revised by the Contractor during phase 1 of this project.

Annex 3: Draft user journeys

Annex 4: Interact IV Brand Design Manual

Annex 5: Draft data processing agreement [document to be finalised and signed together with Contract]