

# Annex 1: Detailed list of requirements

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

Subgroups	I D	Requirement	Material to be submitted <i>(in order for tenderer to demonstrate compliance)</i>	What will be emphasized in evaluation	Deliverable (during project lifetime): Yes/No
0. General Requirements	0.1	<p><b>Time Schedule</b></p> <p>The Contractor shall start working with phase 1 of the assignment immediately after contract signature, and initiate the subsequent phase as soon as possible.</p> <p>The Contractor shall include the project Time Schedule in the offer, to become an annex to the Contract. Any change in the Time Schedule shall be discussed with and approved by the Customer Project Manager before taking effect. The Customer expects the platform to be published within 3-4 months after signature of contract.</p>	Time schedule proposal to be included in Concept Note	Realistic and timely delivery	<i>Yes, the time schedule shall be part of the Concept Note, to be discussed and modified if necessary at the inception meeting</i>

0. General Requirements	0.2	<b>Project management</b>	Yes
<p>The project shall be managed by the Contractor. The Contractor shall appoint a Project Manager, who shall establish a close cooperation with the Customer's Project Manager in the execution of tasks throughout the entire Contract.</p> <p>The details of the cooperation shall be agreed between both parties during the inception meeting.</p> <p>The Contractor Project Manager shall report and align regularly to the Customer Project Manager.</p> <p>The Contractor shall ensure fluid communication with the Customer's Project Manager throughout the duration of the Contract.</p> <p>The Contractor shall meet regularly with the Customer's Project Manager, at least once each week, through a recurring online meeting, but also ad hoc and needs-based, either in person at the Contractor's location or elsewhere, in agreement with the Customer's Project Manager.</p>			

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0. General Requirements	0.3	The Contractor shall request the Customer's approval in accordance with a clear agreed approval process, always allowing the Customer sufficient review time.	The bidder shall submit a preliminary approval process in the Concept Note	To which extent the approval process allows sufficient time for the Customer, and to which extent it describes all necessary approvals	<i>Yes, the approval process shall be part of the Concept Note, to be discussed and modified if necessary at the inception meeting</i>
0. General Requirements	0.4	The Contractor shall prepare all meetings held under this Contract, including:  Issue agenda minimum 5 business days prior to meeting, issue relevant material in sufficient time for participants to prepare, keep minutes of meetings to be shared with participants no later than 5 business days after the meeting, register any agreed actions.			No

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0. General Requirements	0.5	The Contractor must be able to work and communicate efficiently and precisely in English. The members of the team allocated to the task shall have an excellent command of English, according to their respective tasks (e.g. interviewing, drafting, etc.)			No
0. General Requirements	0.6	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.			No
0. General Requirements	0.7	<p>The Contractor's Concept Note describes the Contractor's approach to this project and the methodology applied to fulfil its requirements.</p> <p>The <u>Concept Note</u> shall include:</p> <ul style="list-style-type: none"> <li>• Description of methodology and approach to this assignment</li> <li>• Activities that follow from the methodology and that are to be executed by the Contractor.</li> <li>• Organisation, roles and responsibilities</li> <li>• Customer approval process</li> <li>• Time schedule</li> </ul>	The bidder shall submit a proposed Concept Note. This is expected to be a living document.	<p><i>To which extent does the Concept Note</i></p> <p><i>(a) fulfil the requirements.</i></p> <p><i>(b) well-suited to deal with international, multi-stakeholder, multi-institutional environments.</i></p> <p><i>(b) is the plan clear and</i></p>	Yes

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				<p><i>understandable</i></p> <p><i>(c) is the time schedule robust and efficient</i></p> <p><i>(d) does the plan reflect the activities that follow from the methodology</i></p> <p><i>(e) does the plan and the activities reflect a logical progression, and (f) does the plan demonstrate understanding of the Customer's project and its stakeholders.</i></p>	

Subgroups	I D	Requirement	Material to be submitted (in order for tenderer to demonstrate compliance)	What will be emphasized in evaluation	Deliverable (during project lifetime): Yes/No
0. General Requirements	0.8	The Contractor shall allocate relevant and sufficient key resources for the execution of the tasks and deliverables included in this contract. The team should have experience in online learning platforms, project management, IT, UX, UI and graphic design.	<p>The bidder shall submit a description of the team allocated to this Contract, with experience in online learning platforms, project management, IT, UX, UI and graphic design.</p> <p>The bidder will include their CVs in the offer, containing a description of their title, role in the project, their time allocated for the project in working days,</p>	<i>To which extent the description of the offered project organization demonstrates allocation of resources and relevant skills to each role and gives a clear understanding of the project team and its governance</i>	No

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			education, language skills, relevant experiences including the entity the experience was performed for, a description of the projects and what tasks the person carried out in this project.		
0. General Requirements	0.9	<p>The project will include the following phases:</p> <p>Phase 1: Discovery and solution design</p> <p>Phase 2: Development and deployment</p> <p>Phase 3: Operations and maintenance, including any small further developments needed and hosting until the end of 2029.</p> <p>Phase 4: Closure</p>			No

Subgroups	I D	Requirement	Material to be submitted <i>(in order for tenderer to demonstrate compliance)</i>	What will be emphasized in evaluation	Deliverable (during project lifetime): Yes/No
1. Phase 1: Discovery and solution design	1.1	<b>Objective of phase 1:</b> In this phase, the Contractor shall conduct the necessary research and analysis to confirm the Customer's specific needs and propose the most cost-effective solution design to respond to them.			No
1. Phase 1: Discovery and solution design	1.2	The Contractor shall prepare an agenda for and facilitate an inception meeting with the Customer after award notification, to discuss assumptions, present team members, align time schedule according to any availability restrictions, activities, align the understanding of the methodology and clarify the content of Contract.			Yes, <i>inception meeting agenda &amp; minutes</i>
1. Phase 1: Discovery and solution design	1.3	The Contractor shall deliver an updated and further detailed Concept Note, based on the version delivered as part of the offer and including any adjustments agreed with the Customer during the inception meeting. The updated Concept Note shall be approved by Customer no later than 10 business days after signature of Contract.			Yes, <i>Concept Note</i>
1. Phase 1: Discovery and solution design	1.4	In this phase, the Contractor shall do the necessary research to confirm the Customer's need and, based on this research, revise the preliminary list of functionalities and training program components included in Annex 2, where needed.  This may involve the organisation of workshops with members of Interact, interviews or other methods proposed by the Contractor to gather the necessary information about the Customer's and stakeholders' needs.			Yes, <i>Discovery phase assets</i>



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		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 ( <a href="https://learning.interact-eu.net">https://learning.interact-eu.net</a> ) or building a new one.			
1. Phase 1: Discovery and solution design	1.5	The Solution Design shall contain all technical and functional requirements that translate the platform objectives and the users' needs into a web solution			<i>Yes, Discovery and solution design assets</i>
1. Phase 1: Discovery and solution design	1.6	The Contractor shall deliver a Solution Design that allows for the integration of new features and the integration with other web-services – existing or still in development, for the duration of the Contract. The Solution Design shall reflect on how this is ensured.			<i>Yes, Discovery and solution design assets</i>
1. Phase 1: Discovery and solution design	1.7	<p>Phase 1 will be finalised once the Contractor has delivered, and received approval from the Customer for a <b>solution design including the following deliverables:</b></p> <ul style="list-style-type: none"> <li>• UX assets: revised user personas, user flows, user scenarios, information architecture, wireframes.</li> <li>• Detailed features list, functional requirements and solution stack</li> <li>• Project timeline for the development and deployment of the recommended solution.</li> <li>• Final financial offer for the remaining phases of the contract, that is:</li> </ul>			<i>Yes, Discovery and solution design assets</i>

Subgroups	ID	Requirement	Material to be submitted (in order for tenderer to demonstrate compliance)	What will be emphasized in evaluation	Deliverable (during project lifetime): Yes/No
		<ul style="list-style-type: none"> <li>- phase 2 (Development and deployment) with a fixed price for the recommended solution.</li> <li>- phase 3 (Operations and maintenance, including any small further developments needed and hosting until the end of 2029) with a fixed price per year including any third party licenses.</li> <li>- phase 4 (Closure)</li> </ul>			
2. Phase 2: Development and deployment	2.1	<b>Objective of phase 2:</b> In this phase, the Contractor shall develop the platform and its functionalities, based on the Solution Design and deliver it ready for testing, and finally the solution shall be deployed and ready for use.			No
2. Phase 2: Development and deployment	2.2	In this phase the Contractor shall test the platform to ensure quality and functionality work as expected before publication. The services to be provided in this phase shall be agreed in phase 1.			No
2. Phase 2: Development and deployment	2.3	The Contractor shall include user manual/documentation for the use of the different functions of the back-end as part of this assignment. This must be delivered with as simple and clear language as possible, bearing in mind the varying levels of IT literacy of back-end users			No
2. Phase 2: Development and deployment	2.4	All user manual(s)/ documentation shall be tested as part of the final testing of the system and is subject to approval by the Customer.			Yes

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2. Phase 2: Development and deployment	2.5	The Contractor shall grant access to the test environment for the Customer (5 people)			No
2. Phase 2: Development and deployment	2.6	The Contractor shall carry out testing of the web solution and all functionalities and fix all bugs found as well as test the user experience.			No
2. Phase 2: Development and deployment	2.7	<p>The Contractor shall for each publication deliver a detailed Testing and Publication Plan at least 20 business days prior to publication date unless otherwise agreed in writing by the Parties. The Testing and Publication Plan shall include the following:</p> <ul style="list-style-type: none"> <li>• Description of the test that needs to be d1, how these test covers all the functionalities part of the publication as well as testing of the UX and time plan for the tests</li> <li>• Selection of users to test the system</li> <li>• Dates and time estimate for the testing</li> <li>• Promotion activities in due time prior, during and after the publication. This involves the production of relevant content (copy, graphics) for each social media channel and the platform.</li> </ul>			Yes
2. Phase 2: Development and deployment	2.8	The Contractor shall test the web solution involving the Customer and possibly other stakeholders and users as part of the beta testing.			No

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2. Phase 2: Development and deployment	2.9	The system must be fully tested prior to publication.			No
2. Phase 2: Development and deployment	2.10	The Contractor shall deliver a test report after each beta testing iteration and prior to publication.			Yes
2. Phase 2: Development and deployment	2.11	The Contractor shall publish the platform only after Interact's approval.			No
2. Phase 2: Development and deployment	2.12	The Contractor shall deliver notice of publication of the first version of the platform, minimum 10 business days ahead of time to Interact.			Yes
2. Phase 2: Development and deployment	2.13	The Contractor shall deliver a confirmation of publication immediately after publication.			Yes
2. Phase 2: Development and deployment	2.14	The Contractor shall ensure the platform connects to Interact's contacts' management system so that users can access it via a single sign-on (SSO) authentication method.			No

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2. Phase 2: Development and deployment	2.15	Phase 2 will be finalised once the Contractor has published the platform, after Interact's approval			No
3. Phase 3: Operations and maintenance	3.1	<b>The objective of phase 3:</b> In this phase, the Contractor shall perform general maintenance and standard upgrades. The Contractor shall also continue working with Customer with needed additional functionalities to the platform.			No
3. Phase 3: Operations and maintenance	3.2	The Contractor will be responsible for the platform's general maintenance and support, which shall cover at least: <ul style="list-style-type: none"> <li>• Monthly reporting of the status regarding ticketing system and analytics/tracking of KPIs</li> <li>• Up-time</li> <li>• Ongoing bug-fix.</li> <li>• Response time on support</li> <li>• Response time on bug-fixing</li> <li>• Obligation to release updates regularly in order to keep the system stable and secure.</li> <li>• Maintenance window (planned down-time to deploy new releases).</li> </ul>			Yes
3. Phase 3: Operations and maintenance	3.3	The Contractor shall publish any new iteration of the platform after Interact approves.			Yes

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3. Phase 3: Operations and maintenance	3.4	The Contractor shall deliver notice of publication of any new iteration of the platform, minimum 2 weeks ahead of time to Interact.			Yes
3. Phase 3: Operations and maintenance	3.5	The Contractor shall deliver a confirmation of publication of any new iteration immediately after publication.			Yes
3. Phase 3: Operations and maintenance	3.6	The Contractor will ensure the necessary hosting of the platform for the whole duration of the contract until the end of 2029.			Yes
4. Phase 4: Closure	4.1	<p><b>The objective of phase 4:</b> In this phase, the Contractor will supply all the legacy documentation needed for a smooth transition, should a different team need to take over the project after the end of the contract. This legacy documentation shall include:</p> <ul style="list-style-type: none"> <li>• Description of the platform's architecture, including particular modules and their correlations;</li> <li>• Updated README file that includes guidelines for the system's configuration and installation, operating instructions, list of files included, troubleshooting, changelog, detected bugs;</li> <li>• Requirements files (requirements.txt, package.json) that contain the lists of packages to install when setting up the environment;</li> </ul>			Yes

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		<ul style="list-style-type: none"> <li>• Description of key algorithms (e.g., calculating the service price or any algorithms that are unusual) and mechanism of importing data from 3rd party systems;</li> <li>• Description of key classes and the application's layers; this simply makes it easier for the new team to find the place that requires changes;</li> <li>• Description of the database structure and in the case of a relational database, a description of their correlations should also be included; this can be presented on ERP (Entity Relationship Diagram);</li> <li>• Deployment guidelines, which boils down to instruction of how to deploy the source code, database and run the project on a new server, as well as any necessary administrator/test customer login credentials;</li> <li>• Cloud infrastructure design (it can be a description or diagrams);</li> <li>• Environment variables allowing to run the project swiftly;</li> <li>• Access to third-party services used in the project, such as mailing lists, analytics, payments, etc.;</li> <li>• UX and UI designs, be it wireframes or full-blown screens design that show the direction in which the product is going visually and in terms of the user flow.</li> </ul>			