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**SPECIFICATION for a Learning and Content Management System**

**September 2022**

# 1. Introduction to e-learning at West Lancashire Borough Council

The Council engaged Learning Pool to provide e-learning in a joint procurement arrangement with Chorley Council in August 2016 on a two-year contract. The contract was renewed twice in line with procurement guidelines. However, the second renewal in August 2020 was not co-procured with Chorley Council.

The current contract ended on 14th August 2022. HR and OD Services wish to secure a long-term solution for a system that enhances the Council's Our People Strategy and puts learning and compliance at the heart of our activities.

**2. Scope of the procurement project**

Our People Strategy commits us to become a coaching and learning organisation through building leadership capability across teams and providing the opportunity for all staff to maximise their skills, knowledge and experience to deliver excellence to our internal and external customers and partners.

WLBC aims to be an employer of choice. This means attracting, recruiting, inducting, developing and retaining great people with excellent skills, knowledge and experience. We are committed to succession opportunities for every staff member to enable them to flourish, grow and deliver the highest level of service to our customers. The e-learning package should form an integral part of the Council's learning and development processes and must:

* Support a robust onboarding and employee lifecycle process
* Drive compliance for legislative, regulatory and best practice sector guidance
* Embed a learning culture and inspire excellent performance through continuous learning and improvement
* Enable managers and employees to have ownership of their learning and development
* Support the delivery of the Our People Strategy
* Support the integration of the Council's Expected Behavioural Standards through the appraisal and 1-2-1 processes

As a result of the above business needs, the new system's functionality must support the Council's aims for all staff. WLBC intends to explore as many platforms with as broad a scope as possible whilst adhering to value-for-money principles and the Council's rigorous procurement process.

**3. Functional Requirements**

As stated above, the system that would best suit the needs of the Council would have a broad specification with a range of standard well-designed functionalities and some higher-end specifications within a value-for-money pricing structure. Below is a guide to the range of functionalities the Council seeks.

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| **Function** | **Essential / Desirable** | **Guidance** |
| **Content library and course management** |
| Comprehensive course catalogue available to WLBC all users | Essential  | The submission should outline the course titles and the number of courses available, free or at cost.  |
| Bespoke local government learning section for councillors | Essential | In compliance with the Local Government Association etc. |
| Quality assurance process on all courses | Essential | The Council will expect best practices and modern thinking to be core elements of professional courses. |
| Accreditations | Desirable | Highlight which of your courses are accredited and those that carry a cost, such as professional body courses, e.g. from HSE, CIPD etc. Also, identify course level equivalents where possible, e.g. leadership level 6 equivalent. |
| New Courses in progress | Desirable | Pending courses for the next 12 months, with release dates, news flashes etc. (marketing) |
| List of current compliance / regulatory courses | Essential | The Council will expect that courses comply with relevant legislation such as safeguarding and GDPR etc. and that courses are reviewed and updated on critical changes, e.g. changes to legislation, with guidance on how often they are routinely reviewed. |
| The pricing structure for additional courses that may not be included in the catalogue | Essential | Such as professional qualifications or different sector-based coursing that we might find helpful (such as Housing) |
| The ability for WLBC to edit catalogue courses  | Essential  | Branding, etc., plus subsequent agreement on ownership (intellectual property) if the contract is not renewed and edits are an agreed percentage of content (e.g. over 50% amended) |
| Ability to create libraries for each department/learning group/compliance group | Desirable | Ability to assign learning/training to hierarchy structures, learning groups and individuals |
| Option to share/sell courses across local authorities or similar users  | Desirable | Your fee on sales (percentage of sales etc.) |
| **User management** |
| Number of licences and in what increments are they available? | Essential | Note that WLBC will require about 600 – 700 licences.  |
| Notification if we go over the agreed number of licences | Essential | Including penalties, corrections etc. |
| Simple hierarchy selection to add or move user | Essential | All users on a drop-down list for ease of use or a hierarchy tree are created by the system, and it is simple to select the user's position. |
| Manual 'add new user' simple process. | Essential | Drop down boxes or auto text (or similar) for options such as role title, manager, team, department, service, directorate etc. |
| Ability to develop learning sets to link to role profiles | Essential | Learning sets are linked to the traffic light system |
| Ability to manage leavers and absent (inactive) users | Essential | Long-term absences, etc. |
| The ability for learners to update their learning profiles/details | Desirable | Users can add prior or current learning undertaken elsewhere to provide a comprehensive learning record that will be used during the appraisal / 1-2-1 process or as part of a report. |
| Functionality for managers to add and remove starters and leavers  | Desirable | Add new starters or suspend leavers  |
| The ability for managers to assign training to their team | Essential  |  |
| Request forgotten password and admin password reset options | Essential  |  |
| Easy merge of dual / admin accounts without losing records/data | Essential |  |
| Bulk registration/import from HR systems | Essential  |  |
| Re-instatement of users without losing data | Essential  |  |
| Changing user privilege levels with ease | Essential  | Making somebody an admin, author, manager etc.(the super-admin has these rights) |
| Manager authorisation | Essential  | Training, user-added learning etc. |
| **Infrastructure** |
| Traffic light system for compliance | Essential | Cyclical compliance training alerts to staff and managers if non-compliant; a visually simple graphic to alert managers to team compliance; will allow managers to run complete reports of their team's training at their convenience. Will provide headline view of compliance; could also show manager as non-compliant if a team member is not compliant; allocates compliance training with notice to start and complete. |
| Any functionality that supports compliance | Desirable | For example, the ability to insert policies with editable declaration buttons. |
| The system must allow for individuals with more than one job and manager | Essential | Both managers have authorisation rights; desirable for the user to have dual profiles within one user profile. |
| Compliance management per module | Desirable | Admins can be created per module to manage compliance |
| The system can allocate learning pathways.  | Essential | For example, to create induction programmes, leadership programmes etc. This facility must allow the unlocking of further modules once designated modules are complete. |
| The system must have a manageable communications tool, such as emails to staff and managers alerting them to tasks and course date reminders, scaling up if overdue. | Essential | Regular reminders if completion remains outstanding after an initial 2 weeks/month with copies also sent to line managers |
| Function for the manager to approve trainer-led and other course attendance | Essential | Also, to include more extended e-learning programmes.  |
| The system must have access for at least 6 Council admins and authors  | Essential | HR must have overall control of the site (super admin) Course-specific admins are desirable |
| Other admins' work on the system is visible and available to all administration. | Essential | It is one system that all admins work on and can access all work-in-progress by other administrators.  |
| The system must provide high functionality (interactivity) for authoring, i.e. not just static learning / page-based learning. | Essential | Moving graphics, special effects, and high learner interactivity based on excellent learning design practice. The system must be geared toward learning and content designers rather than technical specialists.  |
| Appropriate photo library for sector and departments | Essential | Also, the ability to create own photo library and store it within the system; photos and images/graphics must also reflect the diversity within the general population. |
| Comprehensive booking system that links to staff email addresses and calendars | Essential | Alerts admin when trainer-led courses are fully booked; waiting list options; downloadable attendance lists for trainer-led events; options to express interest in trainer-led courses |
| Processes in place for system failure | Essential | Including virus fixes; compatibility with browsers |
| The system must be able to integrate rather than just embed other e-learning packages. | Desirable | List of IT systems and e-learning development tools product interfaces with  |
| **Reporting** |
| A simple reporting function for individual users, teams, departments, directorates, courses etc.  | Essential | Functionality allows the creation of a subset of data which can be restricted at field level, e.g. Organisation hierarchy, team hierarchy, position hierarchy, by course or by the learner and within each report, there should be a range of variable data to select from such as completion time, pass mark, completion status etc. |
| A reporting facility to include graphical reports | Essential  |  |
| Course data should not be lost with deleted accounts: it must be static to the course and not the user. | Essential | With PSED, we need to report retrospectively, and we may also need to delete accounts. Therefore, course data could be lost if only linked to the user.  |
| Multiple data options to select and unselect from | Essential |  |
| Ability to create diverse reporting groups from different hierarchies | Essential | For example, cross-council project groups |
| Ability to generate scheduled reports to selected staff, all managers etc.  | Essential |  |
| Starter and leaver reports | Essential |  |
| Progress reporting | Desirable | Reports should show the progress of learners per course as a percentage |
| Report export formats | Essential | CSV, XLs |
| **Performance improvement** |
| Competencies | Essential | The system allows administrators or managers to apply competencies to job roles, teams, or all staff. Potential for competencies to be linked to courses |
| Learning plans | Essential | That can be amended by the manager, administrator and staff member with objectives and goals; a system to alert each party when a change is made to the learning plan. |
| Catch ups  | Desirable | The system will hold information on monthly catch-ups  |
| Appraisal  | Essential | The appraisal process will link to the learning plans, and users will be able to draw appropriate content into the appraisal documentation |
| 360 Degree Feedback | Desirable | To enable staff members to give to and gain feedback from others |
| CPD | Essential | System to automatically assigns CPD points – 1 point for every 15 minutes of learning; manual CPD can be added to learner profile for external training; courses indicate CPD weighting. |
| **Learner experience** |
| Branding | Desirable | Different style options for other directorates/services/departments/teams; ability to add new logos for project learning etc., and ability to brand across the user platform |
| Visuals for key messages | Desirable |  |
| A staff member will be able to download a certificate showing course completion. | Essential | Design / style options for user's certificate |
| Facility for a single sign-on  | Desirable |  |
| Does the system link to any payroll or recruitment systems? | Desirable | Please specify |
| Easy search option for all courses | Essential | Variables include the course name, course type, course content or theme, etc. |
| Percentage match in the course search |  | Closest match by percentage |
| Send branded emails from LMS | Desirable |  |
| Single-click course access | Essential | Single-click to access the e-learning content (i.e. course opens after clicking on the course title or image) |
| Overall learner experience is positive | Essential | The learner is inspired by the learning design and course content and motivated to return. |
| Equality, diversity, inclusion and representation | Essential | A key feature of course content |
| Accessibility | Essential | In line with The Equality Act (2010) |
| Progress | Essential | System to highlight to the user the progress of the module |
| **Course creation** |
| The system will have an easy-to-use course authoring platform to allow the Council to create courses from scratch with appropriate design functionality. | Essential | The platform is ideally integrated into the LMS rather than separate from it. Authoring must be easy to learn (intuitive) within a reasonable time scale and done within the system.  |
| Authoring design | Essential | The system is designed for learning and development specialists to author courses rather than technical specialists. Full authoring is easy to learn within a short timescale. |
| The system will allow the creator to embed external links such as other e-learning or videos.  | Essential | Also, other learning courses can be integrated and fully reportable. It would be ideal if those courses could be fully integrated, rather than just embedded, so that the system reads the course as though it were its course (so every part of the course is trackable, not just the outcome of a pass, fail or grade etc.)  |
| The system allows for quiz functionality.  | Essential | Ability to use a range of question types and quiz formats with the ability to create question banks and random selections |
| The system will have the functionality for the administrator to set the appropriate pass/fail and grade. | Essential |  |
| Attendance on a trainer-led course is updated on the learning record when the administrator/manager/trainer confirms attendance. | Essential |  |
| Highlight your rate to create courses for the Council should this be required. | Essential | Highlight how many courses your content specialist would be able to create on each date. |
| Standard welcome email and course text |  | For course registrations plus the ability to edit this or for the user to opt-out  |
| **Implementation and service level agreement** |
| What is your proposed implementation timescale? | Essential | Including key milestones |
| What support would you offer during the implementation period? | Essential |  |
| What training will you provide during the implementation period? | Essential |  |
| Help desk availability to deal with the following: -* Reset issues
* Initial user queries
 | Essential | Please provide evidence of your help desks performance (satisfaction rates, completion rates and timescales) |
| Clarity on the escalation process of unresolved queries with the help desk and turnaround times | Essential |  |
| Specialist support for authors/admins | Essential | Higher-level problem-solving, mentoring, development and support from technical and learning design experts (SLA) |
| Suite of training modules and webinars for authors/admins | Essential |  |
| Dedicated account manager | Essential |  |
| System Failure and acceptable resolution | Essential |  |
| **Contract management** |
| Complaints process | Essential | Complaint Resolution Policy (SLA) |
| Virtual update and problem-solving meetings | Essential | Acceptable Regularity |
| **Product and service improvement** |
| Service improvement updates | Essential | Highlight your company's approach to product and service improvement. Highlight what developments you are working on |
| System updates | Essential | Typical notice given |
| Awards | Desirable |  |
| **Legal** |
| Data Protection and confidentiality | Essential | System security, specialist external user acceptance test – penetration test etc. (SLA) Where is the data stored?How will it be accessed?Who will have access?What are archived data retention and disposal periods (i.e. leavers 6 years following contract termination)? Will the destruction of data be manual or automated? |
| Data privacy notices | Essential |  |
| Audit | Essential |  |
| Insurance and indemnity | Essential |  |
| Intellectual property rights | Essential | Specifically for authored or hybrid courses |
| **Additional information** |
| Number of clients for whom you provide a service  | Desirable |  |
| Indicative timeline for full implementation | Essential |  |
| Price increments | Essential |  |
| Customer testimonials | Desirable |  |
| A contractor must recognise that the Council is subject to legal duties which may require the release of information under FOIA or the Environmental Information Regulations 2004 | Essential |  |

**Request for information questions**

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| **Name of the responder in full, together with position(s) in the organisation** |  |
| **Date**  |  |
| **Name of Organization** |  |
| **Contact details** |  |

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| Q 1 | **Attractiveness of contract**Based on the above details, would you be likely to bid for the contract when West Lancashire Borough Council Tender? If the answer is no, please can you provide some reasons why? |
| Response |
| Q 2 | **Term of contract** What term would you be looking at to secure your best pricing? Options available are: a) 5yr + 5yr; b) 10yr + 5yr + 5yr;c)5yr +5yr +5yr + 5yr ord) 5yr +2yr +2yr +2yr + 2yr + 2yr? |
| Response |
| Q 3 | **Potential barriers to bidding**Is there anything within the requirements which would prevent or deter you from bidding for the contract?  |
| Response |
| Q 4 | **Alternative solutions**Are there any alternative systems/solutions that you feel could benefit the Council and would recommend we explore as options? Please provide as much information as possible and we would also welcome the opportunity to arrange a demonstration of solutions if necessary.  |
| Response  |