REQUEST FOR PROPOSAL (RFP)

Design and development of self-paced eLearning courses on management of international standardization work

We are ISO, the International Organization for Standardization, the world’s largest developer of voluntary International Standards. Through its 164 national standards bodies (NSBs), it brings together experts to share knowledge and develop voluntary, consensus-based, market-relevant international standards that support innovation and provide solutions to global challenges.

International standards support international trade, protect the environment and human health as well as fostering innovation. The implementation of ISO standards goes beyond solving technical problems to delivering positive results in the economic, environmental and societal dimensions of sustainable development. Therefore, this requires the active participation of the global standards community through ISO’s national standards bodies and their experts.

Like a symphony, it takes a lot of people working together to develop a standard. ISO’s role is similar to that of a conductor, while the orchestra is made up of independent technical experts nominated by our members. They begin the process with the development of a draft that meets a market need within a specific area. This is then shared for commenting and further discussion. The voting process is the key to consensus. If that’s achieved, then the draft is on its way to becoming an ISO standard. If agreement is not reached, then the draft will be modified further and voted on again.

The development of International Standards and other ISO deliverables is carried out by ISO technical committees and their subcommittees and working groups, or by project committees. The scope of a subcommittee must be within the scope of the parent technical committee. Technical committees, project committees and subcommittees can establish working groups to focus on specific tasks such as developing the first draft of a standard or deliverable.

The Directives are the core procedures for standards development work in both ISO and the IEC. They contain the rules which guide the progression of ISO deliverables, including the development of a new International Standard (or other ISO deliverable) or the revision or amendment of an existing ISO standard.

Because there is a lot of document exchange in developing standards and other ISO deliverables, it is important that all participants use the same tools to centralize efforts and maximize efficiency. ISO has developed a number of IT Tools that help support the standards development process. The ISO Helpdesk Knowledge Base provides supporting material for all ISO electronic applications. Furthermore, ISO offers training to help with using its electronic applications.

Recognizing that ISO is only as strong as its members, and that strong NSBs are key to success, one of the ISO strategic priorities within the framework of the ISO Strategy 2030 is “to strengthen ISO members through capacity building”. The ISO Strategy serves as the basis for the ISO Action Plan for developing countries, the overall framework of technical assistance and training support that ISO delivers to its developing country members. Therefore, ISO regularly provides classroom training and virtual instructor-led training (VILT) to the different players in the ISO technical work to manage efficiently and effectively the development of International Standards (see clause 3.3).
ISO is keen to complement this capacity building package by offering self-paced eLearning courses on management of international standardization work to a diverse target audience (see clause 3.4), considering three different levels of training (i.e. basic, intermediate and advanced) to achieve the following overall goals:

a) Define and understand the concepts and rules to manage efficiently and effectively international standardization work.

b) Apply and analyse how to manage efficiently and effectively international standardization work in varied situations, using critical thinking and problem-solving techniques.

c) Evaluate and develop meaningful tasks or products (such as document, process, structure ...etc) by criticizing an idea/concept, illustrating the understanding based on certain criteria and applying the learned concepts to manage efficiently and effectively the international standardization work.

ISO is currently looking for a Supplier to develop self-paced eLearning courses on management of international standardization work, with moderate interactivity level (i.e. level 3) and published in HTML5 format and be compliant with SCORM 1.2 standard, that taps into real needs and solutions for individuals through smart design approaches and empowers learners to make a change (see clause 3.6). These courses will be implemented by ISO and the total value of the Supplier proposal should not exceed five hundred thousand Swiss franc (CHF 500'000). The proposal that exceeds this amount—by not more than 7% of the total cost—might be considered on an exceptional basis where the proposal provides a clear justification, taking into account the impact of this additional cost on the overall score relating to the financial criteria (see clause 1.9.3).

Qualified Suppliers are invited to participate in this Request for Proposal (RFP). The purpose of this RFP is to allow qualified Suppliers to submit their best proposals for this service. Proposals from individual consultants will not be considered given the complexity of the work to be carried out.

Unless otherwise public, the content of this document (including ISO training materials) and any information obtained through endorsed discussions with ISO personnel pursuant to the preparation of your response must be treated as confidential and proprietary information of ISO. No contact should be made by your company to any of our suppliers.

Responses to this RFP are due by 12:00 CET, 2022-02-18 after which time proposals will not be considered without prior written agreement.

Should you have any questions relating to the RFP, please do not hesitate to contact the ISO Procurement Manager at tenders@iso.org and copying the ISO Programme Manager at the capacity building unit at khammash@iso.org.

Yours sincerely,

Erich Kieck
Director, Capacity building
ISO Central Secretariat
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## Terms and Abbreviations

<table>
<thead>
<tr>
<th>Abbreviated term</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>CAG</td>
<td>Chair’s Advisory Group</td>
</tr>
<tr>
<td>COVID-19</td>
<td>Coronavirus Disease</td>
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<tr>
<td>CV</td>
<td>Curriculum Vitae</td>
</tr>
<tr>
<td>DEVCO</td>
<td>ISO Committee on developing country matters</td>
</tr>
<tr>
<td>GSP</td>
<td>Good Standardization Practices</td>
</tr>
<tr>
<td>IDD</td>
<td>Instructional Design Documents</td>
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<tr>
<td>IEC</td>
<td>International Electrotechnical Commission</td>
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<tr>
<td>ISO</td>
<td>International Organization for Standardization</td>
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<tr>
<td>ISO/CS</td>
<td>ISO Central Secretariat</td>
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<td>NSB</td>
<td>National Standards Body</td>
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<tr>
<td>QA</td>
<td>Quality Assurance</td>
</tr>
<tr>
<td>RFP</td>
<td>Request For Proposal</td>
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<tr>
<td>SLA</td>
<td>Service Level Agreement</td>
</tr>
<tr>
<td>SME</td>
<td>Subject Matter Expert</td>
</tr>
<tr>
<td>UAT</td>
<td>User Acceptance Test</td>
</tr>
<tr>
<td>VILT</td>
<td>Virtual Instructor-Led Training</td>
</tr>
</tbody>
</table>
1. RFP process, terms and conditions

1.1 Enquiries

Any query regarding the preparation of the proposal must be addressed in writing by e-mail to the ISO Procurement Manager at tenders@iso.org and copying the responsible ISO Programme Manager as indicated below.

Ms. Nesreen Al-Khammash
Programme Manager
Capacity building at ISO Central Secretariat (ISO/CS)
E-mail: khammash@iso.org

1.2 Modifications

No officer, agent or employee of ISO is authorized to alter orally, any portion of these documents. During the period prior to the submission of information, any clarification or additions will be issued in the form of a written addenda distributed by ISO. Information submitted shall be final and may not be altered by subsequent offers, discussions or commitments unless the respondent is requested to do so by the responsible ISO Programme Manager in a written form.

1.3 Schedule and deadlelines

<table>
<thead>
<tr>
<th>Activity</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP released to potential Suppliers</td>
<td>2022-01-17</td>
</tr>
<tr>
<td>Clarification calls with Suppliers (upon request)</td>
<td>Between 2022-01-19 to 2022-02-14</td>
</tr>
<tr>
<td>Deadline for Suppliers to submit proposal</td>
<td>2022-02-18</td>
</tr>
<tr>
<td>Expected evaluation of proposals</td>
<td>Week of 2022-02-21</td>
</tr>
<tr>
<td>Virtual interview with short-listed Suppliers and contacting customers referenced in the proposals</td>
<td>Week of 2022-03-07</td>
</tr>
<tr>
<td>Validation of the selection</td>
<td>Not later than 2022-03-11</td>
</tr>
<tr>
<td>Preparing draft contract (including legal review)</td>
<td>Week of 2022-03-14</td>
</tr>
<tr>
<td>Award of contract to selected Supplier</td>
<td>Before end of March 2022</td>
</tr>
</tbody>
</table>

These dates are a guide to the time frame expected for this RFP. Dates may change and the ISO Programme Manager will advise any changes.

Proposals must be submitted in an electronic format by 12:00 CET on 2022-02-18 to tenders@iso.org. Proposals received after this without prior written agreement will be disqualified.
1.4 FORMAT OF SUBMISSION

Your proposal should be structured in accordance with the requirements contained in the RFP and should align with each requirement of the RFP by cross-reference to the relevant section number.

Suppliers are encouraged to supply innovative solutions in responding to this RFP. However, Suppliers must strictly adhere, at all times, to the requirements of this RFP. You should include any additional supporting information or alternative proposals as a separate section titled “Alternative Options”.

1.5 RESPONSE DEADLINE

Submissions are due as set out in paragraph 1.3 above, provided that, if the deadline set for submission is extended, ISO will also specify the new date and hour for submission which will replace the above deadline on the ISO website.

Any submission received by ISO after expiry of the initial or extended deadline, as the case may be, will not be considered.

1.6 PARTIAL RESPONSES

Partial proposals not meeting the requirements specified in this RFP will not be considered.

1.7 CLARIFICATION ON RFP

The Supplier should direct any questions arising during the preparation of the proposal, or requests for clarification, in writing by e-mail to the ISO Procurement Manager and copying the responsible ISO Programme Manager (see clause 1.1).

Provision will be made for clarification calls (see clause 1.3 for schedule and deadlines). Please contact the responsible ISO Programme Manager to arrange an appointment. Where appropriate, ISO reserves the right to circulate questions and the answers thereto to all other Suppliers without disclosing the source of the questions or revealing the substance of a proposal.

1.8 VALIDITY

The content and pricing of the proposal must remain valid for six (6) months from the date of submission.

1.9 EVALUATION CRITERIA

1.9.1. Pre-qualification criteria

Only bidders who get an overall score of 80 or higher will pass the pre-qualification criteria described in table 1 below and they would be considered as qualified to move to the next stage of RFP evaluation (see clause 5.5).

The Suppliers are also solely responsible for their tax status, paying any taxes and statutory contributions applicable in respect of fees and reimbursements received.
### Table 1 – Pre-qualification criteria

<table>
<thead>
<tr>
<th>#</th>
<th>Criteria</th>
<th>Fail/Pass (0/20)</th>
<th>Required documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A proof of company registration in a professional or trade register or any other official document showing the registration number</td>
<td>Fail/Pass (0/20)</td>
<td>▪ Copy of company registration document</td>
</tr>
<tr>
<td>2</td>
<td>The company has not been blacklisted by any international organizations over the past five years</td>
<td>Fail/Pass (0/20)</td>
<td>▪ A self-certified letter</td>
</tr>
<tr>
<td>3</td>
<td>The company has the necessary economic and financial capacity to perform this contract until its end</td>
<td>Fail/Pass (0/20)</td>
<td>▪ Latest available audited financial statement or a balance sheet ¹</td>
</tr>
<tr>
<td>4</td>
<td>The company has proof of at least three (3) contracts for the provision of customized eLearning development related services for international organizations/companies, including those with multicultural staff and stakeholders, operating in multi-cultural settings. The contracts must be on-going or delivered within the past three (3) years from target contract engagement</td>
<td>Fail/Pass (0/20)</td>
<td>▪ List of international organizations / companies including the contact details of their focal points with the Supplier, and ▪ Engagement letters or client’s certificates</td>
</tr>
<tr>
<td>5</td>
<td>The company has an active workforce of at least 10-15 personnel, with skills relevant to the service requirements of the RFP</td>
<td>Fail/Pass (0/20)</td>
<td>▪ Company organizational chart including list of senior managers and number of staff</td>
</tr>
</tbody>
</table>

| Maximum score | 100 |

#### 1.9.2. Professional and technical capacities criteria

Table 2 below describes the professional and technical capacities criteria that will be considered by the ISO internal evaluation team. Bidders who receive an overall score below 80% with respect to these criteria will be disqualified from this RFP (see clause 5.5).

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¹ If, for some exceptional reason which ISO considers justified, a bidder is unable to provide the latest available audited financial statement or a balance sheet, it may prove its economic and financial capacity by any other document which ISO considers appropriate.
## Table 2 – Professional and technical capacities criteria

<table>
<thead>
<tr>
<th>#</th>
<th>Criteria</th>
<th>Required documents</th>
<th>Maximum score (100)</th>
<th>Relative weight %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company profile and geographical coverage, including the following:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Number of years the company has been involved in the design and development of customized eLearning courses and services</td>
<td>▪ Company profile</td>
<td>20</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>▪ Number of on-going eLearning development related services as well as the number of delivered courses within the past three (3) years from target contract engagement for international / multinational organizations or companies</td>
<td>▪ Statistics about delivered/going eLearning development related services</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ % of company sales from the design and development of customized eLearning courses compared to the revenues generated from other products and services provided by the company</td>
<td>▪ Statistics about the company sales and revenues</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Specific technical knowledge and skills that the company has in the area relative to the scope of this RFP</td>
<td>▪ Brief description of company knowledge and areas of expertise</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Business continuity plan</td>
<td>▪ Business continuity plan (if available)</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Demonstrated capacity to develop and deliver simultaneously eLearning courses with level 3 of interactivity</td>
<td>▪ At least three samples of different eLearning courses/modules</td>
<td>40</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>▪ At least three projects sign off documents indicating the start and end dates of the project</td>
<td></td>
<td>30</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ At least three courses' evaluations/assessments from clients and end users</td>
<td></td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>#</td>
<td>Criteria</td>
<td>Required documents</td>
<td>Maximum score (100)</td>
<td>Relative weight %</td>
</tr>
<tr>
<td>---</td>
<td>--------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>---------------------</td>
<td>-------------------</td>
</tr>
</tbody>
</table>
| 3 | Effective service delivery methodology demonstrated through presentation of eLearning development approach(es)/models, processes as well as project management to meet the requirements and scope set in clause 3 of the RFP | ▪ Documented service delivery methodology  
▪ Project management approach | 60      | 25%               |
| 4 | Demonstrated capacity to actual service delivery of an eLearning content using the ISO training materials provided in Annex A | ▪ 2 to 3 minutes e-learning prototype developed based on the requirements provided by ISO in the RFP  
▪ 2 to 3 minutes e-learning prototype developed based on the requirements provided by ISO in the RFP | 100 | 15%               |
| 5 | Proven expertise in instructional designing and development of customized eLearning courses using a common cloud-based eLearning authoring tool (see clause 3.6.1) | ▪ At least three examples on complete instructional design documents (IDD)  
▪ Access at least to three customized eLearning courses delivered to clients | 50 | 20%               |
| 6 | Having a sufficient number of qualified eLearning professionals to be assigned to the ISO project, namely: | ▪ Complete set of Curriculum Vitae (CVs) submitted demonstrating the required skills and experience | 100 | 10%               |
|   | ▪ Project Manager(s)  
▪ Instructional Designers  
▪ eLearning Developers  
▪ UX/UI Designers  
▪ Graphic Designers  
▪ Quality Assurance officer(s) | | |
| 7 | Demonstrated professional development and upskilling/reskilling of the Supplier staff through training and certification programs | ▪ Training programme of the Supplier staff  
▪ Certification programme of the Supplier staff | 70 | 5%                |
|   | Total score | - | 100%             |

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2 The prototype should include (at least) a module outline, storyboard, assessment plan … etc.
1.9.3. Financial criteria

Table 3 below describes the financial criteria that will be considered by the ISO internal evaluation team. Bidders who receive an overall score below 80% with respect to these criteria will be disqualified from this RFP (see clause 5.6).

Table 3 – Financial criteria

<table>
<thead>
<tr>
<th>#</th>
<th>Criteria</th>
<th>Required documents</th>
<th>Maximum score (100)</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Clarity and completeness of the financial proposal</td>
<td>▪ Clear pricing mechanism</td>
<td>50</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Complete pricing mechanism</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Cost competitiveness (i.e. the most financially advantageous for ISO will be awarded the maximum score of 60 points. The other offers will then be marked proportionally to the best financial offer) the most economically advantageous tender</td>
<td>▪ Detailed cost estimation</td>
<td>100</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Total score</strong></td>
<td>-</td>
<td>100%</td>
</tr>
</tbody>
</table>

1.10 Pre-award Review and Validation

The ISO internal evaluation team shall evaluate the responses to the RFP and all supporting documents/documentary evidence as per the criteria and requirements specified in this document. Inability to submit requisite supporting documents/documentary evidence, may lead to rejection.

The ISO internal evaluation team may request online meetings with the Bidders to seek clarifications on their responses. The maximum total of professional, technical and financial scores is 200. The three highest scored Suppliers will be short-listed and invited to virtually present their proposals to the evaluation team.

The recommendations of the ISO internal evaluation team will be submitted to the ISO validation panel to assess that due process and proper protocols have been followed and take the final decision concerning the winner Supplier.

Following the decision of the ISO validation panel, the Supplier who has the highest combined technical and financial scores will be awarded the contract.

1.11 General Conditions

By submitting a proposal, the Supplier agrees to all conditions and terms stated in this RFP. If the Supplier does not agree with particular terms, such terms must be discussed in detail with the ISO Procurement Manager before a proposal is submitted.

The working language for all communications is English.
Except for this RFP and otherwise public information, information or communications obtained in relation to this RFP (including clarification calls) may not be released without the express written consent of ISO.

By responding to this RFP, applicants agree that the decision of ISO is final and binding, including any decision to withdraw this RFP or disqualify any proposal. ISO shall not in any way be responsible for any costs incurred in the preparation and presentation of the Supplier’s information.

ISO reserves the right to negotiate all terms and conditions in order to enter a formal contract with the Suppliers, including regarding ultimate pricing. The ultimate decision regarding the awarding of a bid is subject to said negotiation. Inability to accept any required contractual term from ISO can result in disqualification of a proposal, without regard to any prior communication, shortlisting or process. This RFP document, the Supplier’s response and written addenda will form part of the contract.

ISO is not bound to give any reason for rejecting any responses or part thereof.

Unsolicited telephone calls or visits to ISO or ISO staff during the RFP process to obtain proposal status information are prohibited and may result in the Supplier being disqualified from the application process. News releases pertaining to this RFP or the award of any contract related to this RFP may not be made without the prior written permission of ISO.

All work and materials shall comply with all applicable provincial and federal laws, municipal ordinances, regulations, applicable building leases, and directions of inspectors appointed by proper authorities having jurisdiction. Where proof of certifications is required by ISO, the Suppliers shall make all such certificates available for inspection.

The Suppliers shall at all times act impartially and shall refrain from any relationship which would compromise its independence or that of its personnel. If the Suppliers fails to maintain independence, ISO on the basis of its sole discretion reserves the right immediately disqualify the application. The Suppliers shall include a conflict-of-interest statement in its proposal.

1.12 DISCLAIMER

This RFP and its attachments contain all information the Supplier may require preparing a proposal as requested by ISO. The Supplier is advised that if confirmation or clarification of the content or any further information is required, it should contact the ISO Procurement Manager by e-mail at tenders@iso.org and copy the responsible ISO Programme Manager.

The acceptance of a submission to this RFP is not to be construed as representing or creating any binding obligation on ISO to enter into any legal commitment whatsoever. Furthermore, in responding to this RFP, the Supplier is deemed to specifically acknowledge the following:

- Notwithstanding any representation by or on behalf of ISO or any estimate of quantities by ISO shown in this RFP or otherwise given to the Supplier (now or in the future) ISO shall be under no obligation to purchase any particular quantity of products or services, except as otherwise formally agreed in with written and signed contractual agreement.
- The Supplier places no reliance on any such representation or estimates and will place no reliance upon any future representation or estimate that may be provided unless that representation or estimate is noted in the written and signed contractual agreement.
- ISO shall have no liability to the Supplier whether in contract, tort or otherwise with respect to the giving of any such representation or estimate.
1.13 **FRAUD AND CORRUPT PRACTICES**

The Bidders and their respective employees shall observe the highest standard of ethics during the Selection Process.

ISO will not award a procurement contract to a winning bidder that has directly or indirectly engaged in any corrupt, fraudulent, collusive or coercive practice in competing for the contract in question.

1.14 **PENALTIES**

Should the Supplier fail to deliver satisfactory eLearning courses according to the deadline in the project plan/timeline, agreed by both ISO and Supplier, ISO may use it as basis for termination or non-renewal of the service contract.

ISO will communicate service level violations to the Supplier immediately. The Supplier should provide written confirmation and action plan the next business day.

1.15 **CONFIDENTIALITY**

All information disclosed in connection with this RFP is confidential (where so indicated) and the property of ISO. This information must only be released to the Supplier’s personnel to whom release is required in order to prepare a response to this RFP.

Any information obtained through related discussions with ISO personnel pursuant to the preparation of the bidder response must be treated as confidential and proprietary information of ISO. No contact should be made by the bidder to any of our suppliers.
2. Background information

2.1 ISO

a) **History**

ISO is the world’s largest developer of voluntary International Standards. International Standards give state of the art specifications for products, services and good practice, helping to make industry more efficient and effective. Developed through global consensus, they help to break down barriers to international trade.

ISO was founded in 1947, and since then have published more than 22'000 International Standards and standard-type documents covering almost all aspects of technology and business. From food safety to computers, and agriculture to healthcare, ISO International Standards impact all our lives.

b) **Today**

Today, ISO is a not-for profit Membership organization with Members from 164 countries and thousands of technical bodies responsible for standards development. For more detailed information on our organization, including a description of our key projects and an organization chart, please visit our website ([http://www.iso.org/](http://www.iso.org/)).

c) **Membership structure of ISO**

Through its Members, ISO brings together experts to share knowledge and develop voluntary, consensus-based, market relevant International Standards that support innovation and provide solutions to global challenges.

Our Members are the foremost national standards bodies (NSBs) in their countries and there is only one Member per country. Each NSB represents ISO in its country. Individuals or companies cannot become ISO Members. The list of ISO Members can be found on our website ([https://www.iso.org/members.html](https://www.iso.org/members.html)).

Three membership levels are possible in ISO: full, correspondent, and subscriber. Each enjoys a different level of access and influence over the ISO system. This helps us to be inclusive while also recognizing the different needs and capacity of each national standards body.

2.2 **NATIONAL STANDARDS BODIES**

National systems of standards are coordinated by an NSB, who operates as the focal point supporting industry, government authorities and civil society. The organizational status of an NSB can range from:

- A government department;
- An organization of public law (a statutory body); to
- An organization of private law (either a ‘not-for-profit’ or ‘for-profit’ organization).

An NSB’s primary responsibilities include the development and publication of national standards, the provision of standards-related information, and liaison with international and regional standards organizations. The NSB must adhere to Good Standardization Practices (GSPs) while fulfilling its primary responsibilities. Many NSBs also provide standards-related services, such as inspection, testing, certification, and training.
To ensure effective participation in standardization, it is essential for an NSB to engage all relevant stakeholders - from the public and private sector as well as civil society – in the national, regional and international standards-setting process. This requires NSBs to conduct significant advocacy, promotional and outreach activities, making these stakeholders aware of the benefits and application of standards.

2.3 **Capacity Building Unit at ISO/CS**

Recognizing that ISO is only as strong as its members, and that strong national standards bodies are key to success, one of the ISO strategic priorities within the framework of the [ISO Strategy 2030](https://www.iso.org/strategic-plan/) is “to strengthen ISO members through capacity building”. The ISO Strategy serves as the basis for the ISO Action Plan for developing countries, the overall framework of technical assistance and training support that ISO delivers to its developing country members.

Currently, the capacity building unit manages mainly the following areas:

1. Implementing the ISO Action Plan for developing countries 2021-2025 to transfer skills and knowledge to national standards bodies (NSBs) to strengthen their national standardization infrastructure and to better meet their stakeholders needs with respect to the development and implementation of standards. The implementation of the Plan is monitored by the ISO Committee on developing country matters (DEVCO) and its Chair’s Advisory Group (CAG).

2. Undertaking significant efforts to develop a proactive and professional approach to raising funds to support the successful implementation of the Action Plan and other proposed technical assistance activities.

3. Supporting DEVCO by providing the secretariat services, organizing the annual DEVCO meetings and managing the DEVCO CAG activities.

4. Developing and disseminating high-quality education and training materials that ISO Members can re-use to support their training and consulting activities.

5. Organizing training courses and workshops of interest to the ISO members.
3. **Project description and requirements**

### 3.1 Setting the context

International standards support international trade, protect the environment and human health as well as foster innovation. The implementation of ISO standards goes beyond solving technical problems to delivering positive results in the economic, environmental and societal dimensions of sustainable development. Therefore, this requires the active participation of the global standards community through ISO’s national standards bodies and their experts.

Like a symphony, it takes a lot of people working together to develop a standard. ISO’s role is similar to that of a conductor, while the orchestra is made up of independent technical experts nominated by our members. They begin the process with the development of a draft that meets a market need within a specific area. This is then shared for commenting and further discussion. The voting process is the key to consensus. If that’s achieved, then the draft is on its way to becoming an ISO standard. If agreement is not reached, then the draft will be modified further and voted on again. From first proposal to final publication, developing a standard usually takes about 2.5 to 3 years.

The development of International Standards and other ISO deliverables is carried out by ISO technical committees and their subcommittees and working groups, or by project committees. Technical and project committees are established by the Technical Management Board to develop International Standards or other ISO deliverables within their approved scopes. A technical committee may set up one or more subcommittees. The scope of a subcommittee must be within the scope of the parent technical committee. Technical committees, project committees and subcommittees can establish working groups to focus on specific tasks such as developing the first draft of a standard or deliverable.

Each ISO technical committee, project committee or subcommittee is administratively supported by an ISO member body (the “secretariat”). The member body which is appointed by the Technical Management Board to hold the secretariat of a committee is also by default a participating member (P-member) in the committee. The member body which holds the secretariat of a committee appoints a Manager, the person responsible for all administrative aspects of the committee. The Committee Manager is however required to be neutral and to dissociate him/herself from his/her national positions. S/he works closely with the committee Chair in managing the work of the committee.

Nominations for Chairs are submitted by the member body holding the secretariat of a committee. The role of the Chair is to help the committee reach an agreement that will be internationally accepted. This requires him or her to steer the committee towards consensus and recognize when it has been reached. The Chair must remain neutral and cannot therefore continue to be a national representative in the committee s/he is chairing.

**Working group Convenors** are appointed by the technical committee, project committee or subcommittee. The role of the Convenor is to lead the work of the experts in the working group. S/he must also apply the principles of consensus. S/he can also be supported by a secretariat, as needed.

ISO members can choose whether they want to be part of a particular TC, and their level of involvement. **O-members** can observe the standards that are being developed, offering comments and advice. While **P-members** actively participate by voting on the standard at various stages of its development. In most cases, the experts that develop ISO Standards work in the field. They understand and anticipate the challenges of their sector, using standardization as a tool to create a level playing field that benefits everyone. Recognizing the constraints on
developing countries to take part effectively in the development of International Standards, ISO delivers capacity building support through an overall framework of development assistance – the ISO Action Plan for developing countries. Figure 1 below summarizes the main players in the development process of ISO standards.

The following documents include details of the roles and responsibilities of those involved in standards development, as well as how to play an active role in the process.

1) My ISO Job
2) Getting Started toolkits
The **Directives** are the core procedures for standards development work in both ISO and the International Electrotechnical Commission (IEC). They contain the rules which guide the progression of ISO deliverables, including the development of a new International Standard (or other ISO deliverable) or the revision or amendment of an existing ISO standard.

- **Part 1 of the Directives** is particularly important as it indicates the required standards development procedures to be followed. ISO also has unique procedures which are not applicable to the IEC. These are contained in the Consolidated ISO Supplement, which consolidates the ISO/IEC Directives, Part 1 and the ISO specific rules.

- **Part 2 of the Directives** contains rules for the structure and drafting of standards. It also covers the way in which terms are used and the accepted use of units, tolerances, symbols and probability statements. Working group Convenors have the primary responsibility for following Part 2.

Because there is a lot of document exchange in developing standards and other ISO deliverables, it is important that all participants use the same tools to centralize efforts and maximize efficiency. ISO has developed a number of **IT Tools** that help support the standards development process. The **ISO Helpdesk Knowledge Base** provides supporting material for all ISO electronic applications. Furthermore, ISO offers training to help with using its electronic applications.

### 3.2 THE SITUATION TODAY

Before the COVID-19 pandemic, the capacity building unit in collaboration with the staff members of the standards department and IT services department at the ISO/CS had organized annually three on-site training sessions for the ISO/TCs/SCs Committee Managers (and their support teams) and working group Convenors. These training sessions were held over four (4) days for each session. The following major topics were covered during the training sessions:

- Development process of International Standards
- Drafting of International Standards
- Project management
- Organizing and attending meetings
- Use of ISO IT tools for development of International Standards

In addition, the capacity building unit in collaboration with the staff members of the standards department and external consultants had organized before 2020 a number of on-site training sessions for the people leading the ISO technical work (i.e. Chairs and Convenors) over three (3) days for each session, where the first day covered briefly the development process of International standards.

With the onset of the pandemic in 2020 and the strict travel restrictions and confinement measures, we have adapted the way in which we work to support the ISO technical community members. Hence, we have converted these on-site training sessions to Virtual Instructor-Led Trainings (VILTs) that are delivered over two weeks covering the same topics listed above with more interactive activities to encourage collaboration and building networking which maximizes the engagement of learners with the instructors. The **first week consists of four (4) sessions (2.5 – 3 hours per session)** while the second week consists of two (2) sessions. In total, we deliver four VILTs per year to accommodate the different time zones of the participants around the world.

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3 There is an existing self-paced eLearning course on project management in the ISO environment.
3.3 PURPOSE OF THE RFP

The purpose of this RFP is to enter into an Agreement with a professional Supplier to design and develop self-paced eLearning courses on management of international standardization work that consists of the following four (4) subject areas/parts:

- a) Development process of international standards
- b) Use of ISO IT tools for development of International Standards
- c) Structure and drafting of International Standards
- d) Leading the development work of International Standards

The design and development work of the first three subject areas/parts listed above should be completed in 2022, while the work on the latter subject area/part should be completed in 2023 (see clause 3.6.3). The use of ISO IT tools should be explained and interlinked with each stage in the development process of International Standards. Bidders are requested to propose the best and most cost-effective solution to meet ISO’s requirements, while ensuring a high-quality product, taking into consideration the use of the ISO resource materials (provided in Annex A) as a basis.

3.4 OVERALL GOALS OF THE ELEARNING COURSES

By the end of the self-paced eLearning courses, the learners should be able to:

- a) Define and understand the concepts and rules to manage efficiently and effectively the international standardization work.
- b) Apply and analyse how to manage efficiently and effectively the international standardization work in varied situations, using critical thinking and problem-solving techniques.
- c) Evaluate and develop meaningful tasks or products (such as document, process, structure ...etc) by critiquing an idea/concept, illustrating the understanding based on certain criteria and applying the learned concepts to manage efficiently and effectively the international standardization work.

The ISO project team has developed the overall and specific learning objectives for each subject area/part (listed in clause 3.3) in Annex B, considering the application of the Bloom’s taxonomy model to differentiate three different levels of training (i.e., basic, intermediate and advanced). These learning objectives should be further fine-tuned by the Supplier during the analysis stage and validated by the ISO subject matter experts (SMEs) and project manager.

3.5 TARGET AUDIENCE

The self-paced eLearning courses should address the following different players in the ISO technical work, considering three different levels of training (i.e. basic, intermediate and advanced) that are defined in Annex B:4

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4 For further information on the roles and responsibilities of the different players in the ISO technical work, you can check the following resources:
- PMM Roles - Responsibilities & Capability Requirements
- Getting started toolkit for ISO Committee Chairs
- Getting started toolkit for ISO Committee Managers
- Getting started toolkit for ISO Working Groups Convenors
a) Chairs of ISO technical committees and sub-committees
b) Working group convenors
c) Project leaders of International Standards projects
d) Committee Managers of the ISO technical committees and sub-committees
e) Experts of ISO technical committees, sub-committees and working groups.
f) Secretaries of the national mirror committees that act as the national counterparts to ISO technical committees and sub-committees.

3.6 **SCOPE OF SERVICES**

The selected Supplier will have to perform the tasks described below.

3.6.1. **In-scope services**

a) The Supplier will be responsible for all the activities associated with the instructional design and development of the eLearning courses using the content materials provided by ISO in English (see Annex A). **Here are some of the vital features that should be considered for these self-paced eLearning courses:**

1) Be interactive, easily navigated and delivered in English language across multiple electronic devices, from desktop computers and laptops to tablets and smartphones,

2) Choosing the appropriate informational material, figuring out the most effective instructional strategy, selecting the right media to transmit the message,

3) Ensuring that the learning objectives, instructional strategies and assessment are aligned,

4) Ensuring the content and navigation flow in a logical and user-friendly pattern so learners can spend time retaining the messages,

5) Using a mix of interactive formats for content presentation to address varied learner profiles and learning styles,

6) Assuring to design a clear learner journey covering three levels of training (basic, intermediate, and advanced). Some learners will be navigating from the basic level of the eLearning course up to the advanced level and the supplier should come up with a solution to fulfil these personalized learning needs (see Annex A).

7) Helping to drive targeted behavioural change and performance improvements,

8) Using formative assessments and summative assessments to evaluate learners’ knowledge, and

9) Applying the ground rules of accessibility while designing the eLearning content to create an inclusive environment that assures effective learning for all.

b) The Supplier shall create a detailed project plan for each eLearning course including a timeline and milestones.

c) The eLearning courses shall be developed using a common cloud-based eLearning authoring tool such as Articulate 360 (our preferred option). At the end of each course development, the Supplier is required to turn over to ISO the final individual SCORM files (one SCORM file for each topic/lesson) and the editable version of the course, as well as all the visual and audio assets used throughout the courses.
d) The eLearning courses shall have at least Level 3 of interactivity as defined in table 4 below. This is the preferred level of interactivity because it optimizes the trade-off between active learning and development time.

Table 4 – eLearning interactivity levels

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1: Passive</td>
<td>The learner acts solely as a receiver of information. Content is presented linearly through text, video, audio or simple interactive activities. This level of e-learning is not generally as effective as those with more interactivity. Level 1 e-learning is best used to communicate procedural knowledge or to raise awareness of simple topics.</td>
</tr>
<tr>
<td>Level 2: Limited</td>
<td>The learner controls the presentation of the content and can progress in a nonlinear sequence through the course. Interactions are relatively simple and may include practice scenarios, interactive exercises, multiple choice questions and clickable graphics. Feedback on these interactions is used to reinforce the learning. Level 2 e-learning is best used for training that requires low level problem solving, knowledge acquisition and comprehension, routine practice or topic refreshers.</td>
</tr>
<tr>
<td><strong>Level 3: Moderate (target level)</strong></td>
<td>The learner interacts with the content through flexible, nonlinear manner. Multiple responses to instructional cues are made using a variety of techniques that focus on applying knowledge and making decisions. This level may include animated videos, customized audio, complex drag and drop interactions, scenario-based challenge questions, simulations, stories and branching scenarios and multimedia.</td>
</tr>
<tr>
<td>Level 4: Full immersion</td>
<td>The learner is directly involved in real-time, project-based learning. The eLearning experience provides an authentic simulation of job performance. Level 4 activities provide opportunities for real-time problem solving, assessment, feedback and remediation. Examples include simulated environments, serious games, complex branching scenarios and other advanced media.</td>
</tr>
</tbody>
</table>

e) The instructional design approach/model of the self-paced eLearning courses, to be applied by the Supplier, should be aligned with the learners’ needs and the overall goals. The Supplier should consider the pedagogical and technological dimensions together with a learner-centred design to provide competency based-learning experience and facilitate the required behavioural change. Some basic guiding principles of instructional design that can provide a good starting point for the ISO eLearning project are described below.

1) This project should have three levels of training. We have merged the six levels of Bloom’s taxonomy to create the following three levels:
   - basic level of training
   - intermediate level of training
   - advanced level of training

The existing on-site and VILT content covers mainly the first two levels of training, basic and intermediate, over five days (see clause 3.2). Therefore, additional
content should be created in collaboration with the SMEs (8 to 10 days' worth of training content) to cover the three levels of training.

2) Creating simulation-based learning and include the social learning aspect through forming community of practice so that the learners can share their problems, experiences and solutions.

3) Pairing the eLearning content with supplementary live webinars over the course duration to cover the key points of the different modules and hold an open discussion/Q&A session on those topics.

4) Providing a framework for the development, implementation and use of results from assessments of learning objectives in different core/support subject areas for different purposes and to address the needs of different target audience. The concept of peer evaluations and team projects as a part of advanced level training should be considered where the learners should work together on a common/real problem or project.

5) Developing a competency framework for the people leading the technical work in collaboration with the SMEs and using the ISO/IEC Directives Part 1, annex L. The competency framework should provide an inventory of expected behaviors, skills and attitudes that lead to successful performance.

6) Using a set of different instructional design methods (when appropriate) to create meaningful learning solutions for various situations through the courses such as:
   - Scaffolding: to break up difficult/new concepts so that they can be learned more easily and support the learners to retain what they’ve learned (especially in the context of a particular technical assignment).
   - Short simulation-based learning: to provide hands-on experience to learners to show how a theory or practice applies to real-life situations.
   - Project based learning: to integrate real-world situations into the learning experience.
   - Case-based learning: to show the application of a theory or concept to real situations to induce a deeper level of learning by encouraging more critical thinking skills.
   - Learning by practice (sandboxes): to test the use of ISO IT tools without impacting live platforms/tools using the ISO virtual training environment (sandboxes).
   - Video tutorials: to provide step-by-step guidance for specialized activities/tasks and help with knowledge retention.

f) The Supplier shall deliver all the project-related services remotely.

3.6.2. Estimated seat time

The estimated seat time of the ISO eLearning project - the time it will take a learner to go through a course - is shown in table 5 below, taking into account the duration of the on-site training sessions and VILTs (mentioned in clause 3.2) as well as the complexity of the subject areas and the interactive components of different learning activities.

The total estimated time (42-48 hours) should be validated by the Supplier, keeping in mind the nature of the existing ISO content as well as fulfilment of the project requirements.
Table 5 – Estimated seat time

<table>
<thead>
<tr>
<th>Subject area</th>
<th>Estimated seat time</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core area 1: Development process of international standards</td>
<td>18-20 hours</td>
<td>▪ The seat time for eLearning has been reduced by about 50% of the traditional classroom setting.</td>
</tr>
<tr>
<td>Support area 1: Use of IT tools for standards development (tutorial videos)</td>
<td></td>
<td>▪ 6-8 hours added for each area to cover additional content to be developed (when needed) and reaching level 3 of training</td>
</tr>
<tr>
<td>Core area 2: Structuring and drafting of International Standards</td>
<td>10-12 hours</td>
<td></td>
</tr>
<tr>
<td>Core area 3: Leading the development work of International Standards</td>
<td>14-16 hours</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>42-48 hours</strong></td>
<td></td>
</tr>
</tbody>
</table>

3.6.3. Project timeline

The tentative timeline for the development of the self-paced eLearning courses is described in table 6 and figure 2 below. The Supplier has to inform ISO whether the proposed timeline is feasible or if an adjustment should be considered.

Table 6 – Project timeline

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Timeline</th>
</tr>
</thead>
</table>
| Core area 1: Development process of international standards | ▪ Analysis: April – May 2022
▪ Design and development: June – December 2022
▪ User Acceptance Testing (UAT), providing feedback and resolving issues encountered during testing: January – February 2023
▪ Launching the eLearning content: March 2023 |
| Support area 1: Use of IT tools for standards development (tutorial videos) | ▪ Analysis: May – June 2022
▪ Design and development: July – December 2022
▪ User Acceptance Testing (UAT), providing feedback and resolving issues encountered during testing: January – February 2023
▪ Launching the eLearning content: March 2023 |
| Core area 2: Structuring and drafting of International Standards | ▪ Analysis: January – February 2023
▪ Design and development: March – August 2023 User Acceptance Testing (UAT), providing feedback and resolving issues encountered during testing: September – October 2023
▪ Launching the eLearning content: November 2023 |
| Core area 3: Leading the development work of International Standards | ▪ Analysis: January – February 2023
▪ Design and development: March – August 2023 User Acceptance Testing (UAT), providing feedback and resolving issues encountered during testing: September – October 2023
▪ Launching the eLearning content: November 2023 |

5 The Supplier could propose a shorter timeline provided that the project team is able to meet all the RFP requirements and deliver a high-quality eLearning courses.
CORE AREA 1 AND SUPPORT AREA 1

MILESTONE
Analysis
Apr-May 2022

MILESTONE
Design & development
Jun-Dec 2022

MILESTONE
User Acceptance Testing (UAT), providing feedback and resolving issues
Jan-Feb 2023

MILESTONE
Launching the eLearning content
Mar 2023

CORE AREA 2

MILESTONE
Analysis
May-Jun 2022

MILESTONE
Design & development
Jul-Dec 2022

MILESTONE
User Acceptance Testing (UAT), providing feedback and resolving issues
Jan-Feb 2023

MILESTONE
Launching the eLearning content
Mar 2023

CORE AREA 3

MILESTONE
Analysis
Jan-Feb 2023

MILESTONE
Design & development
Mar-Aug 2023

MILESTONE
User Acceptance Testing (UAT), providing feedback and resolving issues
Sep-Oct 2023

MILESTONE
Launching the eLearning content
Nov 2023

Figure 2 – Project timeline
3.6.4. Deliverables breakdown

The implementation of the ISO project shall be carried-out in two phases through 2022-2023 (see clause 3.6.3). The first phase shall include the design and development of the eLearning content for the following three (3) subject areas/part:

- a) Development process of international standards
- b) Use of ISO IT tools for development of International Standards
- c) Structure and drafting of International Standards

The second phase shall include the design and development of the eLearning content relating to leading the development work of International Standards. The implementation of this phase will begin only upon satisfactory completion and delivery of the first phase.

The project deliverables per subject area/part is shown in table 7 below.

**Table 7 – Project deliverables per subject area/part**

<table>
<thead>
<tr>
<th>Deliverable type</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project plan</td>
<td>A document which contains course development activities and detailed timeline.</td>
<td>Supplier, ISO sign-off</td>
</tr>
<tr>
<td>Instructional Design Document (IDD)</td>
<td>IDD provides a framework that guides all key individuals involved in the eLearning development process. It answers questions such as:</td>
<td>Supplier, ISO sign-off</td>
</tr>
<tr>
<td></td>
<td>- What is the purpose of the course?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- What are learners expected to know/do at the end of the course?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Who is the audience?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- How will the course be accessed?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- What will be the instructional strategy adopted?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- What are the interactive elements used?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- How will learners be assessed?</td>
<td></td>
</tr>
<tr>
<td>Content outlines and Storyboards</td>
<td>Content outlines, storyboards and prototypes for ISO sign-off prior to the development stage</td>
<td>Supplier, ISO sign-off</td>
</tr>
<tr>
<td>Editable eLearning course files</td>
<td>The editable files should be accessible using an eLearning authoring tool approved by the ISO (see clause 3.6.1)</td>
<td>Supplier, ISO sign-off</td>
</tr>
<tr>
<td>SCORM 1.2 package</td>
<td>This package includes:</td>
<td>Supplier, ISO sign-off</td>
</tr>
<tr>
<td></td>
<td>- The eLearning course delivered by the selected Supplier shall be published in HTML5 format and be compliant with SCORM 1.2 standard.</td>
<td></td>
</tr>
<tr>
<td>Deliverable type</td>
<td>Description</td>
<td>Responsibility</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td></td>
<td>• A SCORM package that contains all the files to upload the course into a SCORM compliant LMS (i.e. Moodle platform(^6)).</td>
<td></td>
</tr>
<tr>
<td>Visual and audio assets</td>
<td>A ZIP folder containing all visual and audio assets used in the course.</td>
<td>Supplier</td>
</tr>
<tr>
<td></td>
<td>• Visual assets include but not limited to fonts, icons, graphics, images, and animations.</td>
<td>ISO sign-off</td>
</tr>
<tr>
<td></td>
<td>• Audio assets include but not limited to voice recordings, music, and sound effects.</td>
<td></td>
</tr>
<tr>
<td>Project sign-off document</td>
<td>A document that signifies ISO acceptance of all project deliverables, primarily the final version of the eLearning course</td>
<td>Supplier</td>
</tr>
<tr>
<td></td>
<td>ISO</td>
<td>ISO</td>
</tr>
</tbody>
</table>

3.6.5. Supporting documents

ISO will provide the Supplier with an access to further supporting documents besides the annexed PowerPoints to develop the eLearning courses.

3.6.6. Out of scope services

The following services are out of scope of this project:

a) Major revisions to the eLearning courses after sign-off – ISO may opt to seek the Supplier’s expertise again should there be major updates or revisions to the completed courses.

b) Development of eLearning courses on subject areas other than the ones listed in clause 3.3.

c) Translation of eLearning courses into other languages (such as French, Spanish …etc). However, this will be considered in the near future as a complementary project.

3.7 SERVICE LEVEL REQUIREMENTS

3.7.1. Service levels

The Service Level Agreement (SLA) with the Supplier will cover service quality, availability and resolution of change requests and delivery of eLearning courses. The service level requirements are described in table 8 below.

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\(^6\) The current ISO digital learning platform is Moodle.
Table 8 – Service levels for each subject area/part

<table>
<thead>
<tr>
<th>Item</th>
<th>Service level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email correspondence</td>
<td>Turnaround time: within 24-36 hours</td>
</tr>
<tr>
<td>Application of fixes and change requests</td>
<td>Turnaround time: within 48-72 hours</td>
</tr>
<tr>
<td>Delivery of eLearning course</td>
<td>Delivered according to the project plan/timeline</td>
</tr>
<tr>
<td>User acceptance testing (before launching the course online)</td>
<td>80% positive feedback from users during (UAT)</td>
</tr>
<tr>
<td>Course assessment by the learners (after launching the course online)</td>
<td>80% positive feedback from learners</td>
</tr>
</tbody>
</table>

3.7.2. Reporting

The Supplier shall prepare and submit the following regular reports:

a) Project plan (see clause 3.6.4)

b) Biweekly report on the progress of eLearning courses development.

3.8 SUPPLIER TEAM DELIVERING THE PROJECT SERVICES

The success of this project is largely defined by the quality of the Supplier team involved in the development of the eLearning courses. **Due to the considerable scope of the ISO eLearning project, the Supplier shall provide a qualified team with a minimum of five (5) years of relevant experience in instructional design, eLearning development and graphic/media design.** The team members shall include at least the following:

a) **Project Manager(s)** – This person is responsible for tracking the progress of the project and ensuring that the deliverables will be delivered according to the agreed timeline and Service Level Agreement with the ISO/CS.

b) **Instructional Designers** – These persons are responsible for conducting the learning needs analysis, instructional design strategy as well as storyboarding and audio scripting.

c) **UX/UI Designers** – To help learners easily navigate through digital learning modules and courses without causing any confusion (i.e. consistent navigation and layout, concise and clear writing, accessibility guidelines, content chucking, a clear purpose of each activity and slide, the sequence of the content, motivational element (i.e. progress bar or badge, etc).

d) **Graphic Designers** – These persons are responsible for the production of all visual assets, such as photos, icons, graphics, infographics and animations.

e) **eLearning Developers** – These persons are responsible for course authoring and programming of user interactions, graphic animations and transitions. The developer is also in charge of publishing the eLearning course to SCORM package ready for upload in the LMS.

f) **Quality Assurance Officer(s) (QA)** – This person is responsible for reviewing and testing the functions and interactivity of the course after the development stage. The QA officer also ensures the consistency and accuracy of text, visuals and narration.
It is recommended that two teams work in parallel on the project to cover the different subject areas mentioned in clause 3.3. The Supplier shall submit to ISO the detailed CVs of the team members. It is the responsibility of the Supplier to inform the respective team members and get their consent to send their CVs to ISO for this specific project.

The Supplier should facilitate knowledge transfer among team members when there are changes to the team composition during the entire contract period. Once resources are assigned to the project, they may not be substituted or replaced without the approval of ISO.

The Supplier is expected to have a succession plan in place in case of a team member's resignation or termination, so as not to affect the project schedule. ISO must approve any change that might affect the composition of the project team. The Supplier shall provide replacement within five (5) working days after the team member's resignation or termination while maintaining the same selection criteria applied on the initial team member.

3.9 Financial and payment terms

The total value of the Supplier proposal should not exceed five hundred thousand Swiss franc (CHF 500'000). The proposal that exceeds this amount by not more than 7% of the total cost might be considered on an exceptional basis where the proposal provides a clear justification, taking into account the impact of this additional cost on the overall score relating to the financial criteria (see clause 1.9.3). The Supplier proposal is not paid. No reimbursement of expenses related to the preparation of any proposal will be made by the ISO/CS.

All prices should be expressed in Swiss francs. The financial proposal shall show the breakdown of the cost estimation per subject area/part. The proposed contract payment modalities shall be as follows for each subject area/part subject to adjustment (if needed) upon negotiating the project contract:

a) 20% at the acceptance and sign-off of the project plan and instructional design document;

b) 50% at the acceptance and sign-off of the design and development processes deliverables (i.e., content outlines, storyboards and prototypes including an editable eLearning course file); and

c) 30% at the acceptance and sign-off the SCORM 1.2 package, visual and audio assets and project sign-off document.

The contract price shall not vary from the price that the Supplier quoted in its Bid, except for any major change resulting from a Change Order issued by ISO.

The invoices shall be sent to ISO only after confirmation given in writing of acceptance of the deliverables and payment can be expected within 30 days of the receipt of the correctly detailed invoice.

4. Notifications of bid result

After submitting a proposal, but within the time limit for receipt of bids, the Supplier may still submit a new version of their proposal. The Supplier shall formally notify ISO that the previous proposal is withdrawn.

Following the decision of the validation panel at the ISO/CS, notification emails are simultaneously sent to all bidders; letters to unsuccessful bidders will state the grounds for rejection. The receipt of such notification letter does not imply any contractual relationship which will exist only upon signature of the contract by ISO and the successful bidder.
5. Supplier’s proposal

The Supplier shall sign the bid declaration form in Annex C and provide comprehensive responses to all the items listed below as part of the proposal and in the same order.

5.1 PROPOSAL DESCRIPTION

The Supplier shall describe in a maximum of four (4) pages their understanding of this project and how should be delivered.

5.2 SUPPLIER’S PROFILE

a) History

The Supplier shall provide brief history of the company and general presentation regarding its products, services and solutions.

b) Key strengths

The supplier shall elaborate on the following:

- Specific technical knowledge and skills that the company has in the area relative to the scope of this RFP
- Competitive advantage
- Formal certification / accreditation

c) Supplier business continuity

The Supplier should provide details of the business continuity planning process they have in place. The Supplier may wish to include corporately developed documentation and brochures on the subject. The Supplier should indicate whether they have ever invoked a business continuity plan.

d) Bankruptcy

The Supplier shall mention if their company has ever filed for bankruptcy. If yes, the Supplier should explain in detail the reasons why, the filing date and the current status.

5.3 EXPERIENCE AND RESOURCES WITHIN PROJECT AREA

a) Previous projects

The Supplier shall describe three previous similar projects in the scope of this RFP that are ongoing or delivered within the past three (3) years from target contract engagement for international organizations/companies including:

- Why those projects are relevant to the scope of this RFP.
- Instructional design approach/model applied to the projects
- Major issues or problems that may have occurred and how they were resolved.
- When those projects were delivered.
b) **Knowledge of ISO and ISO members**

The Supplier shall describe any previous experience with ISO and its members. The Supplier shall provide contact person(s) and location.

The Supplier shall mention if any of the employees in their company related, either personally or professionally, to a person currently employed by ISO or its members.

The Supplier shall mention to the best of their knowledge if any ISO employee or contractor previously employed by his/her company.

c) **References**

The Supplier shall provide three (3) relevant current clients references including:

- Project short description
- Company name
- Location
- Contact person and position
- Email and phone

The references provided above may be directly contacted by ISO during the evaluation phase of the Supplier’s proposal.

### 5.4 PROJECT SPECIFIC QUESTIONS

a) **Qualification and expertise**

The supplier shall describe in detail the following and provide examples (when appropriate):

1) How the proposed instructional design approach/model answers the scope of services described in the RFP (see clauses 3.3 – 3.6).

2) How the proposed learning activities/solutions are aligned with the eLearning objectives, training levels and the diverse target audience (see clauses 3.3 – 3.6).

3) The specific processes and tools that are intended to put in place to respond to the requirements as set out in the RFP (see clauses 3.3 – 3.6).

4) The proposed quality assurance approach with regard to the different types of service requirements as referred to in the RFP.

5) The instructional design skills and pedagogical approach of the team who will be assigned to work on this project as well as their abilities to work with a remote team in an international context and deal with people of different cultures (see clause 3.8).

b) **In scope items, deliverables**

The Supplier shall describe all the deliverables and services which will be provided as part of this project.

c) **Out of scope items**

The Supplier shall describe all items or requirements of this RFP that won’t be addressed in the company proposal.
d) **ISO involvement**

The Supplier shall describe the support required from the ISO staff to perform this project successfully and the estimated working days of the SMEs.

e) **Project management approach**

The Supplier shall describe how the assigned team will manage this project and the tool(s) that will be used for this purpose.

f) **Implementation plan**

The Supplier shall provide an implementation plan and timeline for this project (see clause 3.6.4).

g) **Resources, including the specific competencies and resumes**

The Supplier shall describe the human resources that will be assigned to work on this project including their qualifications and experiences. The detailed CVs of the Supplier team shall be attached with the proposal (see clause 3.8).

5.5 **Compliance with the pre-qualification, professional and technical capacities criteria**

The Supplier shall complete the forms in Annexes D and E and submit them as part of the proposal.

5.6 **Project Financials**

The Supplier shall submit the most suitable pricing structure that gives ISO a full picture of all detailed expenses or costs. ISO will assume that all provided costs are exhaustive and thus will not allow further costs to be introduced during contract negotiations, should the Supplier be selected.

All prices should be expressed in Swiss Francs. Recurring expenses should be shown monthly.

In case of discrepancies between price given in words and that given in figure for the same item, the prices given in words shall prevail.

ISO will expect any selected Supplier to provide consolidated invoices on a monthly basis to include all charges for that month.

ISO payment terms are 30 days from the date a correctly detailed invoice is received (see clause 3.9). The Supplier should confirm their agreement with those terms.

5.7 **Legal Documents**

The Supplier shall refer to the ISO’s general terms and conditions in clause 1 and provide ISO with their view on any clauses that would entail issues on their side.

ISO will use its own service contract template for any ultimately chosen proposal.

Without express permission from ISO, Suppliers are not permitted to use or display the trademarked ISO logo, during or after the RFP process.
5.8 **ADDITIONAL RELEVANT INFORMATION**

The Supplier shall provide any additional information which is useful for ISO to know in the context of this RFP.
Annex A

ISO resource and training materials

The ISO resource and training material can be accessed via the links below.

<table>
<thead>
<tr>
<th>Resource #</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Classroom training material (including training programme) for the ISO/TCs/SCs committee managers (and their support teams) and working group convenors</td>
</tr>
<tr>
<td>2</td>
<td>Classroom training material (including training programme) for the ISO/TCs/SCs Committee Managers (and their support teams) and working group Convenors (revamped material in 2020 but not being used so far in training)</td>
</tr>
<tr>
<td>3</td>
<td>VILT material (including training programme) for the ISO/TCs/SCs Committee Managers (and their support teams) and working group Convenors</td>
</tr>
</tbody>
</table>
| 4          | Classroom training material (including training programme) for the people leading the ISO technical work (i.e. Chairs and Convenors)  

Note: The current training material will be revamped by external consultants during the first half of 2022. |
| 5          | ISO/IEC Directives, Part 1  
Consolidated ISO Supplement - Procedures for the technical work - Procedures specific to ISO |
| 6          | ISO/IEC Directives, Part 2  
Principles and rules for the structure and drafting of ISO and IEC documents |
| 7          | My ISO job |
| 8          | Getting started toolkit |
Annex B

Subject areas and learning objectives

The topics of the different subject areas and their related learning objectives can be accessed via the link below.
Annex C

Bid declaration form

The Supplier shall sign the bid declaration form and submit it as part of the proposal.
Annex D

Compliance sheet for pre-qualification criteria

The documents mentioned in this compliance sheet along with this form, should be a part of the pre-qualification proposal.
Annex E

Compliance sheet for professional and technical capacities criteria

The documents mentioned in this compliance sheet along with this form, should be part of the professional and technical capacities proposal.