

Invitation to Tender

Learning Management System

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1. Background

Connect Housing Association (Connect) is a social housing organisation providing affordable homes and support across West Yorkshire. We provide around 3,500 homes across the region for lots of different types of households. But our work goes beyond providing homes for people.

We also offer a wide range of support for families, young homeless people, older people, people with disabilities, mental ill health, dementia, experiencing domestic abuse, and homeless people.

Connect is seeking to improve its management tools and digital infrastructure to support us on a journey to become more data led, more efficient and to enable our people to focus on the activities that add value to our customers and our communities, rather than on administrative tasks.

Key to this are our HR systems, with a focus currently upon our digital approach to managing Learning and Development (L&D). We work within a highly regulated environment, and it is crucial that our workforce is appropriately skilled and trained in line with mandatory requirements, and that we can confidently evidence that they are so. It is also important for our colleague experience to make sure that L&D opportunities are easy to navigate, simple to book onto, and that the system provides a modern interface that can better engage our employees. Real time compliance data is essential, with visibility for both line managers and HR, alongside the ability to craft bespoke reports.

Connect staff profile

Connect currently has approximately 200 employees. This is across a mix of permanent and fixed-term arrangements, including a range of working arrangements (e.g. compressed hours, part-time, shift work). Our services and departments are diverse. As well as traditional housing functions – with residents who are often vulnerable and with complex needs - we manage several supported housing schemes. In this sense, some of our work and training demands are similar to those in a health and social care setting. On the flip side, we employ a large in-house maintenance team, that we need to engage regularly with on a wider range of health and safety training needs.

Within our 200 staff, we have an HR team of four staff. All will be expected to use the LMS from time to time, but with our HR Advisers the regular users, who organise training on a day-to-day basis. We have approximately 40 supervisors/line managers

with responsibility for staff, who require a level of functionality focused upon their managerial roles.

Our main office is in Dewsbury, and we have a small number of other workspaces around West Yorkshire.

Current relevant HR systems

Function	Application
HRIS	Natural HR / Moorepay Launched in April 2023
e-learning platform	Virtual College (with some content sourced from other providers)
Creating own content	Captivate

Current Operational Environment

The Connect Housing ICT strategy is for a preference of adopting cloud-based technology where appropriate.

Connect currently operate a VMWare environment housed with data centres located in the Isle of Man running its Housing Management and Financial operations; access is provisioned using Azure Virtual Desktop accessed either by thin client when located at an office space or via a provisioned laptop.

Other services, including Human Resources operations, are currently provisioned by Software as a Service solutions mentioned above.

Microsoft 365 E5 licensing is provisioned for access to Office Software (Word/Excel etc.) and Exchange Online for email processing. Microsoft Teams is deployed and used for communications between staff.

All users (200) of our systems are issued with a Samsung Android mobile phone and - apart from our property service operatives (40) - are issued with a Windows 10/11 laptop.

All mobile devices issued are enrolled into Microsoft Intune as our MDM solution.

Our on-premise environment is backed up using Veeam to immutable storage which is subsequently pushed to off-site storage.

Microsoft Sentinel, Microsoft Defender and Microsoft Defender for Endpoint are deployed across our environment with the addition of Darktrace providing a further layer of cyber security.

Azure Active Directory / Entra – provides identity services to our organisation.

2. Overview of requirements

Our Expectations

Connect expects the proposed solution to be:

- Flexible
- easy to use (front and back end)
- fast
- accessible
- secure
- intuitive

We will assess the functionality of each proposed solution out of the box against Connect's baseline requirements. Whilst some workflow configuration is anticipated, this must be straightforward to build, with the HR team able to add to this over time.

We expect a solution to enable Connect to:

- Ensure that L&D processes are followed consistently, with maximum automation of process, business rules and workflow, driving costs down and effectiveness up.
- Have clear visibility of live L&D compliance data, ease of access to information and relevant access for employees, appropriate to their role/seniority within the organisation.
- Ensure data integrity through removal of duplication and integration with Natural HR/Moorepay, where viable.
- A reporting function that provides generic standard reporting, with the ability to build more complex bespoke reports internally.
- Both utilise the course library from the solution provider (or wholesale, or selecting a bespoke suite of course options), but also create our own learning content and add e-learning content sourced from other providers.

We expect the solution to work easily out of the box, but we also have high expectation that it will provide a sophisticated range of functionality that an HR team might expect, opening up new ways of working to the team and to colleagues.

3. Detailed Essential Requirements

Part 1: General Requirements

Experience, governance and viability

We are seeking a supplier who is established in the field, and who has relevant sector experience (which may be social housing, or a similarly regulated public/third sector environment). It is important that our organisational values are compatible and that suppliers can actively demonstrate their commitment to being a fair employer.

Suppliers must also be able to demonstrate that they have a secure market and financial position and a stable operating environment.

IT requirements

The information technology strategy for Connect Housing is to, where possible, move to a software as a service (SaaS) model. Due to the nature of some of the current core housing software solutions the transition may be a journey via infrastructure as a service (IaaS) and platform as a service (PaaS).

The solution should be provisioned as Software as a Service this can be hosted either on public or private cloud. All data should be hosted and processed within the UK or EU including provision for backup and replication.

- If public cloud – detail required of service used
- If private cloud – detail required of provider of data centre including tier level
- Detail to be provided in relation to continuity of service related to data backup and general business continuity.

The solution should be able to integrate with Azure Active Directory to enable:

- Single Sign on
- Synchronization of attributes (e.g. line management, job title etc.)

It is intended to migrate training data from our existing software (NaturalHR/Moorepay/Virtual College). At a minimum, this will cover the last three years of training (for existing staff).

A mobile-friendly platform would also be highly desirable.

Data processing requirements

Provision of a data migration strategy should be detailed.

Detail to be provided of the support structure and associated service level agreement.

Whilst it is intended that the solution should be able to provide all possible standard reporting (see section below) we are keen to understand the capabilities of the solution in terms of integrations and access to data. Detail to be provided of standard API's and integrations available as standard 'out of the box'. Chargeable enhanced capabilities should be noted as such.

As the Data Controller Connect Housing would also wish to understand:

- If direct access to the data within the database can be provisioned.
- Options available to enable 3rd party backup of the data.
- The exit strategy in terms of data egress.

The solution should be able to integrate with the Microsoft 365 product set for document creation, data exports. Detail to be provided of full capabilities.

The solution should be fully auditable to establish what change was made when and by whom.

Branding

The product should allow alignment with Connect's brand identity. This should include:

- Logo
- Colour palette
- Tone of voice / language
- Font where possible

Implementation

We expect implementation to be a partnership approach, project managed by the supplier.

We require the project implementation to be:

- Planned to an appropriate level of detail
- Adequately resourced from the supplier
- Be based on realistic timeframes
- Reflect that we are a small organisation with limited resources
- Include ample time to upskill Connect staff on continued use and development of the system.

Account Management

Our **minimum** expectations for account management are:

- Quarterly account management meetings during first year (potentially more frequent during initial deployment period).
- Customer support available during UK Monday to Friday business hours (i.e. 9am-5pm).
- Customer support response time: initial response within one hour, urgent fixes within 24 hours.
- Online User Guides/Knowledge Base for self-guided support.

Part 2: Learning and Development Requirements

E-learning

- E-learning content available directly from provider
- Ability to host third-party e-learning content & Connect's own content
- Automatic allocation of mandatory e-learning, bespoke to role requirements
- Regular reminders / prompts to email to complete e-learning
- Dashboard reporting to managers flagging non-compliance
- Reallocation of e-learning following expiry of compliance period (e.g. reallocate health and safety training 2 or 3 years after initial completion)
- Personalised learning content pushed to the employee would also be a benefit.

In Person training

- Course listings can be created and published, that allow for self-service booking
- Course listings that allow employees to express an interest (i.e. create a waiting list)
- Delegates lists to be easily extracted to provide to trainers
- Course bookings to sync with Microsoft Outlook
- Easy to reconcile delegate list with those who attended on the day (i.e. to create accurate training records)

Wider Training Programmes

- Ability to develop training programmes / content sections on the LMS, for example, housing various elements of a management development programme in one place so the full blended suite can be seen at a glance.

Training records

- Successfully completed training (both elearning and in person) to automatically create a training record against each individual
- Training records to be visible to individuals, managers and HR
- Import existing training records into system as part of project implementation
- Visibility of qualifications / professional accreditations etc.

Professional/other training requests

- System can handle requests for professional training (e.g. triggering a workflow for approval from relevant budget holders/Directors)
- Appropriate pathway for employees to flag training needs for discussion with HR.

Compliance Reporting

- Dashboards with live data available at individual, line manager and HR level.
- Ability to report separately on mandatory and non-mandatory content.
- Reporting must include the ability to take an overview of compliance at a course/organisational level, at a glance. e.g. "92% of employees are up to date with data protection training". Reports must be able to drill down to who is non-compliant, which team, etc.
- Reports/dashboard view to show compliance on an individual basis – i.e. how much mandatory training has been completed by individual employee.

4. Process, timetable and criteria

Written submissions

Interested suppliers should make a written submission by **Tuesday 10 June 2025**.

We would invite you to make a full written submission that gives a clear product overview and explicitly illustrates how you can best fit our stated requirements, as set out in more detail further this section, in the context of this overall brief. Requirements that you cannot meet should be stated clearly. Where you think you can exceed our requirements and add further value, this can be included (and it should be clear whether this comes at an additional cost).

You should explicitly outline which of your modules we would need to adopt to meet our stated requirements.

Your outline of your pricing model and costs, must include:

- a. The initial set up/design/build costs
- b. Annual subscription costs (full breakdown of what we would be paying for)
- c. Any other charges that may apply, either during implementation or as an additional cost once we were up and running.

Potential suppliers should note that our maximum budget for all costs over a 3-year period is £50,000.

Indicative Timetable

Date	Activity
22 May 2025	Advert released
10 June 2025	Closing date for Written Submissions
By 20 June 2025	Shortlisting completed by Connect; suppliers notified
Week commencing 30 June 2025	Supplier demos/presentations
By 11 July 2025	Decision made and communicated

Evaluation Approach and Scoring

Stage 1 – Organisational / Infrastructure Requirements

The initial assessment of all tenders will be against the following criteria on a 'pass/fail' basis:

Requirements	Assessment
<p>Price</p> <p>The overall cost must not exceed £50,000 over a three-year period.</p>	<p>Pass/fail</p>
<p>IT requirements</p> <p>The solution should be provisioned as Software as a Service - this can be hosted either on public or private cloud.</p> <p>All data should be hosted and processed within the UK or EU including provision for backup and replication.</p> <ul style="list-style-type: none"> • If public cloud – detail required of service used • If private cloud – detail required of provider of data centre including tier level • Detail to be provided in relation to continuity of service related to data backup and general business continuity. <p>The solution should be able to integrate with Azure Active Directory to enable:</p> <ul style="list-style-type: none"> • Single Sign on • Synchronization of attributes (e.g. line management, job title etc.) 	<p>All criteria must be met.</p> <p>Pass/fail.</p>
<p>Data processing requirements</p> <p>Provision of a data migration strategy should be detailed. Historic training records (up to three years) must be able to be migrated into the system.</p> <p>Detail to be provided of the support structure and associated service level agreement related to data processing.</p> <p>As the Data Controller Connect Housing would also wish to understand:</p>	<p>All criteria must be met.</p> <p>Pass/fail.</p>

<ul style="list-style-type: none"> • If direct access to the data within the database can be provisioned. • Options available to enable 3rd party backup of the data. • The exit strategy in terms of data egress. <p>The solution should be able to integrate with the Microsoft 365 product set for document creation, data exports. Detail to be provided of full capabilities.</p> <p>The solution should be fully auditable to establish what change was made when and by whom.</p>	
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Stage 2

For all tenders who pass through Stage 1, at the second stage tenders shall be evaluated on price and on the remainder of their written submission. This stage of the process shall account for **85%** of the overall score.

Part A: Price

The Price shall be evaluated as follows: -

1. The cheapest acceptable tender will be awarded a full score of 40, accounting for **40% of the overall scoring**.
2. All other tenderers will be awarded a percentage based on the following formula:

$$\left(\frac{\text{Lowest Tender Price}}{\text{Your Tender Price}} \right) \times 40$$

NB – if Connect suspects that there has been an error or there is an anomaly in the pricing, we reserve the right to seek such clarification as it considers may be necessary from one or more tenderers. Connect is not bound to accept the lowest or any tender. Connect may also reject a tender if, in our opinion, the rates / prices are so low that the work cannot be delivered.

Part B: Quality

The quality of the tender will be evaluated against the following criteria

Requirements	Assessment
<p>Experience, governance and viability</p> <p>Provide written detail and provide accompanying documentation – where appropriate – to evidence your suitability and stability as a potential partner for Connect Housing. This should include:</p> <ol style="list-style-type: none">1. Background company information, including:<ol style="list-style-type: none">a. History, financial stability, market position and company valuesb. Relevant and/or related sector experience and insightc. Statements on:<ol style="list-style-type: none">i. GDPR complianceii. Whether you are a Real Living Wage employeriii. Cyber securityiv. Business continuityv. Data Processing Agreementvi. Privacy Statementvii. Modern Slavery <p>Two relevant customer testimonial statements/approved case studies should also be supplied, that may be contacted at the final stage to seek appropriate references from.</p>	Maximum 10 points
<p>Integration</p> <p>Detail to be provided of standard API's and integrations available as standard 'out of the box'.</p> <p>In particular, the potential to integrate with Moorepay/NaturalHR should be specifically addressed.</p> <p>Chargeable enhanced capabilities should be noted as such.</p>	Maximum 10 points
<p>E-learning capability</p> <p>Please detail the extent to which your product can:</p>	Maximum 10 points

<ul style="list-style-type: none"> • Supply e-learning content directly from provider • Host third-party e-learning content & Connect's own content • Automatically allocation and re-allocation of mandatory e-learning, bespoke to role requirements • Issue regular reminders / prompts to email to complete e-learning • Provide dashboard reporting to managers flagging non-compliance • Provide personalised/tailored content suggestions 	
<p>In Person training</p> <p>Please detail the extent to which your product can:</p> <ul style="list-style-type: none"> • Enable course listings to be created and published, which allow for self-service booking • Enabled employees to express an interest in a course with no current training date (i.e. create a waiting list) • Produce delegates lists to be easily extracted to provide to trainers • Allow course bookings to sync with Microsoft Outlook • Easily reconcile a delegate list with those who attended on the day (i.e. to create accurate training records) 	Maximum 10 points
<p>Compliance Reporting</p> <p>Please detail the extent to which your product can:</p> <ul style="list-style-type: none"> • Show dashboards with live data available at individual, line manager and HR level. • Report separately on mandatory and non-mandatory content. • Report compliance at a course/organisational level, at a glance. e.g. "92% of employees are up to date with data protection training". • Present reports that can be drilled down, e.g to who is non-compliant, which team, etc. • Reports/dashboard view to show compliance on an individual basis – i.e. how much mandatory training has been completed by individual employee. <p>Other popular reporting options not highlighted here should also be presented in the information provided.</p>	Maximum 10 points

Training records Please detail the extent to which your product can: <ul style="list-style-type: none"> • Successfully completed e-learning to automatically create a training record against each individual • Enable training records to be visible to individuals, managers and HR • Give visibility of qualifications / professional accreditations etc. 	Maximum 10 points
Implementation Please detail a proposed implementation plan to illustrate your typical approach to software implementation and the level of resource that would likely be allocated – this will not be binding but will help us to determine a ‘good fit’ with our expectations.	Maximum 5 points
Account Management Please detail the customer/account support that will be available from the point of implementation onwards.	Maximum 5 points
Branding Please provide an outline of how customisable the design of the platform is for alignment with the Connect brand identity, including mocked up examples or case studies from other consenting customers.	Maximum 5 points

The maximum scoring for Part B is 75 points, assessed against the table set out in Appendix A. The total score will be multiplied by 0.6, to produce a score out of 45. **This will be added to the Price score to produce an initial score at Stage 2 of a maximum of 85 points.**

Final stage (Stage 3)

Connect anticipates invite up to **three** scoring suppliers to give a demonstration of the product taking us through how the solution meets the brief. Connect will also at this point follow up with the provided customer references.

Whilst it is anticipated that the three suppliers who score the highest against the criteria set out above will be invited to a further demonstration and dialogue session before a final decision is made, if the top supplier scores higher than its/their nearest competitor

by 15% or more (and therefore cannot be overtaken on scoring), Connect reserves the right to invite a single supplier, for a clarification conversation in the first instance, as a preferred bidder.

The final stage demonstration will be evaluated against the following criteria:

Requirements	Assessment
<p>User Experience</p> <p>The panel will assess user experience from the perspective of both HR and employees using the LMS. We will be looking for:</p> <ul style="list-style-type: none"> • Intuitive usage / navigation • Fewest 'clicks' • Ease of building reports, content and workflow • Whether the site is fully mobile-optimised 	Maximum 5 points
<p>Look and feel</p> <p>The panel will assess how attractive and engaging the product is. This will include its ability to become a 'one stop shop' for learning by housing multimedia items alongside learning options.</p> <p>For example, this may include the potential to build a 'management development' section, that includes other useful resources (PDFs etc.) alongside learning content and course listings.</p>	Maximum 5 points
<p>Reporting / dashboards / compliance</p> <p>The panel will wish to particularly focus on this area and be shown the various ways in which compliance with mandatory training can be supported and is presented. They will wish to view compliance from:</p> <ul style="list-style-type: none"> • The HR perspective • The manager perspective • The employee perspective <p>In particular, the panel will be seeking a 'minimal intervention' approach – automation where appropriate, e.g. reminders, flags, prompts etc.</p>	Maximum 5 points

The maximum additional scoring for Stage 3 is 15 points. **This will be added to the scores from Stage 2 to give a final score out of a maximum of 100.** The highest scoring bidder will be offered the contract, subject to a standstill period.

Appendix A: Scoring Criteria

Score	Term	Typical Characteristic
0-2 (10-point scale) 0 (5-point scale)	Unacceptable	No response or extremely limited response. Response inconsistent and/or unworkable and/or does not address Connect's requirements. Shows extremely limited understanding of, and/or extremely inappropriate approach to, the matter in question. <i>An 'unacceptable' score on any question will result in automatic rejection of the tender.</i>
3-5 (10-point scale) 1 (5-point scale)	Poor	Response is limited and is lacking in relation to a significant proportion of material elements, is unworkable and/or inconsistent and only partially meets Connect's requirements. Shows limited understanding of, and/or inappropriate approach to, the matter in question.
6-7 (10-point scale) 2 (5-point scale)	Satisfactory	Response broadly responds to Connect's requirements at a reasonable standard. Shows reasonable understanding of, and/or acceptable approach to, the matter in question.
8 (10-point scale) 3 (5-point scale)	Good	Response meets Connect's requirements. Shows very sound understanding of, and appropriate approach to, the client brief.
9 (10-point scale) 4 (5-point scale)	Very Good	Response meets Connect's requirements at a very high standard and exceeds them in some areas. Shows extremely sound understanding of, and highly appropriate approach to, the client brief.
10 (10-point scale) 5 (5-point scale)	Excellent	Exemplary response: exceeds expectations in all respects, and Bidder could not be expected to answer question more comprehensively or appropriately.