



REQUEST FOR PROPOSAL (RFP)

DESIGN AND DEVELOPMENT OF SELF-PACED ELEARNING COURSE ON FUNDAMENTALS OF CONFORMITY ASSESSMENT AND THE CASCO TOOLBOX

We are ISO, the International Organization for Standardization, the world's largest developer of voluntary International Standards. Through its 170 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.

Conformity assessment is the term given to techniques and activities that ensure a product, process, service, management system, person or organization fulfils specified requirements. Examples of these techniques and activities include assessment, auditing, calibration, evaluation, examination, inspection, and testing which can result in a supplier's declaration of conformity, certification or accreditation. The ISO Committee on Conformity Assessment (**CASCO**) is the committee responsible for conformity assessment in ISO. CASCO develops policy and publishes standards related to conformity assessment, but it does not perform conformity assessment activities.

Conformity assessment activities should follow the requirements contained in the relevant International Standards developed by CASCO, to ensure consistency worldwide and facilitate cross-border acceptance of results, making regional and international trade easier. The World Trade Organization (WTO) Technical Barriers to Trade (TBT) Agreement requires WTO members to use International Standards or guides issued by international standardizing bodies as a basis for national procedures for conformity assessment.

By relying on conformity assessment in accordance with International Standards, regulators and the market can be assured that claims of conformance in relation to the products, processes, services, management systems, persons or organizations are well-founded and legitimate. In addition, it assists in avoiding unnecessarily complex regulation that may add unnecessary costs to the economy and reduce competitiveness of domestic production, and that may be substantially different to those in other economies which can lead to technical barriers to trade.

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 (VILTs) sessions on the use of conformity assessment

activities and tools as well as on the implementation of ISO/IEC CASCO standards to the different players in the quality infrastructure systems of ISO's developing country members.

ISO is keen to complement this capacity building package by **offering a self-paced eLearning course on the fundamentals of conformity assessment and the CASCO toolbox** to achieve the following overall objectives:

- a) Provide a basic understanding of the quality infrastructure and the fundamentals of conformity assessment as well as the different conformity assessment activities and their appropriate use.
- b) Develop a basic understanding of the CASCO toolbox and its benefits to the various stakeholders.
- c) Illustrate the articles of the WTO TBT Agreement that deal with conformity assessment procedures and how they are essential for international trade to avoid unnecessary barriers to trade.
- d) Describe the use of conformity assessment by regulators in various regulated sectors around the world.

ISO is currently looking for a Supplier to develop a self-paced eLearning course on the fundamentals of conformity assessment and the CASCO toolbox, with moderate interactivity level and published in HTML5 format and compliant with the SCORM 1.2/2004 standard. It needs to tap into real needs and solutions for individuals through smart design approaches and empower learners to make a change (see clause 3.6). The total value of the Supplier proposal should not exceed one hundred thousand Swiss franc (CHF 100'000).

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 RFP preparation must be **treated as confidential and proprietary information of ISO**. No contact should be made by the Supplier to any of our current suppliers.

Responses to this RFP are due by **12:00 CEST, 2024-06-27** 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 Digital Learning Team Leader 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

Abbreviated term	Description
CAG	Chair's Advisory Group
CASCO	ISO Committee on Conformity Assessment
CV	Curriculum Vitae
DEVCO	ISO Committee on developing country matters
GSP	Good Standardization Practices
IDD	Instructional Design Document
IEC	International Electrotechnical Commission
ISO	International Organization for Standardization
ISO/CS	ISO Central Secretariat
LMS	Learning Management System
NSB	National Standards Body
QA	Quality Assurance
RFP	Request For Proposal
SLA	Service Level Agreement
SME	Subject Matter Expert
UAT	User Acceptance Test
VILT	Virtual Instructor-Led Training

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 Digital Learning Team Leader as indicated below.

Ms. Nesreen Al-Khammash Digital Learning Team Leader Capacity building at ISO Central Secretariat (ISO/CS) E-mail: khammash@iso.org
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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 Digital Learning Team Leader in a written form.

1.3 Schedule and deadlines

Activity	Due Date
RFP released to potential Suppliers	2024-06-03
Clarification calls with Suppliers (upon request)	Between 2024-06-10 to 2024-06-21
Deadline for Suppliers to submit proposal	2024-06-27
Expected evaluation of proposals	Week of 2024-07-01
Virtual interview with short-listed Suppliers and contacting customers referenced in the proposals	Week of 2024-07-15
Validation of the selection	No later than 2024-07-19
Preparing draft contract (including legal review)	Week of 2024-07-22
Award of contract to selected Supplier	Before end of July 2024

These dates are a guide to the time frame expected for this RFP. Dates may change and the ISO Digital Learning Team Leader will advise any changes.

Proposals must be submitted in an electronic format by **12:00 CEST on 2024-06-27** to tenders@iso.org and copying the ISO Digital Learning Team Leader at the capacity building unit at khammash@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 clause number.

Suppliers are encouraged to provide examples of 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 clause titled "Alternative Options".

1.5 Response deadline

Submissions are due as set out in clause 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 Digital Learning Team Leader (see clause 1.1).

Provision will be made for clarification calls (see clause 1.3 for schedule and deadlines). Please contact the responsible ISO Digital Learning Team Leader to arrange an appointment. Where appropriate, ISO reserves the right to circulate questions and answers to all other suppliers without disclosing the source of the questions or the content of any 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 100 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

#	Criteria	Fail/Pass (0/20)	Required documents
1	A proof of company registration in a professional or trade register or any other official document showing the registration number	Fail/Pass (0/20)	<ul style="list-style-type: none"> ▪ Copy of company registration document
2	The company has not been disqualified or disbarred by any international organizations over the past five years	Fail/Pass (0/20)	<ul style="list-style-type: none"> ▪ A self-certified letter
3	The company has the necessary economic and financial capacity to perform this contract until its end	Fail/Pass (0/20)	<ul style="list-style-type: none"> ▪ Latest available audited financial statement or a balance sheet ¹
4	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	Fail/Pass (0/20)	<ul style="list-style-type: none"> ▪ List of international organizations / companies including the contact details of their focal points with the Supplier, and ▪ Engagement letters or client's certificates
5	The company has an active workforce of at least 10-15 personnel, with skills relevant to the service requirements of the RFP	Fail/Pass (0/20)	<ul style="list-style-type: none"> ▪ Company organizational chart including list of senior managers and number of staff
Maximum points		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).

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

#	Criteria	Required documents	Maximum points	Relative weight %
1	Company profile and geographical coverage, including the following:			
	<ul style="list-style-type: none"> Number of years the company has been involved in the design and development of customized eLearning courses and services 	<ul style="list-style-type: none"> Company profile 	20	10%
	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> Statistics about delivered/going eLearning development related services 	25	
	<ul style="list-style-type: none"> % 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 	<ul style="list-style-type: none"> Statistics about the company sales and revenues 	20	
	<ul style="list-style-type: none"> Specific technical knowledge and skills that the company has in the area relative to the scope of this RFP 	<ul style="list-style-type: none"> Brief description of company knowledge and areas of expertise 	25	
<ul style="list-style-type: none"> Business continuity plan 	<ul style="list-style-type: none"> Business continuity plan (if available) 	10		
2	Demonstrated capacity to develop and deliver simultaneously eLearning courses with moderate level of interactivity	<ul style="list-style-type: none"> At least three working samples of different eLearning courses/modules 	40	15%
		<ul style="list-style-type: none"> At least three projects sign off documents indicating the start and end dates of the project 	30	
		<ul style="list-style-type: none"> At least three courses' evaluations / assessments from clients and end users 	30	

3	Effective service delivery methodology demonstrated through presentation of eLearning development approach(es)/models, learning design experience, processes as well as project management to meet the requirements and scope set in clause 3 of the RFP	▪ Documented service delivery methodology	60	25%
		▪ Project management approach	40	
4	Demonstrated capacity to actual service delivery of an eLearning content using the ISO training material provided in Annex A	▪ 2 to 3 minutes e-learning prototype developed based on the requirements provided by ISO in the RFP ²	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 of complete instructional design documents (IDD)	50	20%
		▪ Access at least to three customized eLearning courses delivered to clients	50	
6	Having a sufficient number of qualified eLearning professionals to be assigned to the ISO project, namely: <ul style="list-style-type: none"> ▪ Project Manager ▪ Instructional Designers ▪ eLearning Developers ▪ UX/UI Designers ▪ Graphic Designers ▪ Quality Assurance officer 	▪ Complete set of Curriculum Vitae (CVs) submitted demonstrating the required skills and experience	100	10%
7	Demonstrated professional development and upskilling/reskilling of the Supplier staff through training and certification programs	▪ Training programme of the Supplier staff	70	5%
		▪ Certification programme of the Supplier staff	30	
Total points			700	100%

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

#	Criteria	Required documents	Maximum points	Relative weight %
1	Clarity and completeness of the financial proposal (including cost breakdown of project deliverables)	▪ Clear pricing mechanism	100	20%
		▪ Complete pricing mechanism	100	20%
2	Cost competitiveness (i.e. the most financially advantageous for ISO will be awarded the maximum score. The other offers will then be marked proportionally to the best financial offer) the most economically advantageous tender	▪ Detailed cost estimation	100	60%
Total points			300	100%

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 successful 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 Supplier, 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 Supplier shall make all such certificates available for inspection.

The Supplier shall at all times act impartially and shall refrain from any relationship which would compromise its independence or that of its personnel. If the Supplier fails to maintain independence, ISO on the basis of its sole discretion reserves the right immediately disqualify the application. The Supplier 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 Digital Learning Team Leader.

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 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.

1.16 Data Protection

It is not envisaged that the provision of the contemplated services and deliverables by the successful Supplier within the scope of the future contract to be concluded with ISO would require access and/or processing of personal data (for instance, no access to the ISO digital learning platform is envisaged). However, if the successful Supplier would need to process personal data for ISO in the context of providing the contemplated services and deliverables, the Supplier would have to sign a Data Processing Agreement, which should include the EU Standard Contractual Clauses in case there is an access to personal data from a country with no adequate level of data protection. In such instance, the Supplier would have to warrant its ability to process any personal data transmitted by ISO in the context of the future Contract and the performance of the services/deliverables (hereafter referred to as the "Personal Data") in accordance with the applicable laws on the protection of personal data, in particular but not limited to, the Swiss Federal Data Protection Act (FADP) or the European General Data Protection Regulation (GDPR), where applicable (hereafter referred to as the "Applicable Laws"), as well as in accordance with the processing purposes defined by ISO.

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 170 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/>).

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>).

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

The national standardization system is coordinated by an NSB, which acts as a focal point to support industry, government 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** 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

Setting up a Quality Infrastructure System is one of the most positive and practical steps that a developing nation can take on the path forward to developing a thriving economy as a basis for prosperity, health and well-being. The main components of a quality infrastructure (QI) are metrology, standardization, conformity assessment, accreditation, and market surveillance. The benefits of standardization in improving economic efficiency and providing access to world markets cannot be achieved without the ability to make reliable measurements and demonstrate that items conform to the requirements specified in the standards. Accreditation adds an additional level of confidence to these activities.

A QI supports domestic markets, making them more effective, facilitating their access to foreign markets as well as the diversification of their exports, and generally helps to promote economic development. For successful trade, manufacturers need to ensure that their products are of consistent quality, comply with relevant standards, and meet the appropriate consumer requirements and specifications in their intended market. As part of their QI, all economies need access to credible conformity assessment services.

Most societies recognize the domestic benefits of their QI and many have established the appropriate national bodies and international relationships to support their system. However, national systems that are not harmonized regionally or internationally have the potential to introduce new technical barriers to trade. All economies today are increasingly expected to demonstrate, not only to their own citizens but also to the wider world, that the products and services they produce are reliable, safe and socially and environmentally responsible. To achieve this aim, each economy requires an effective domestic technical capability, or access to foreign expertise or global conformity assessment services, to underpin the conformity assessment services in their country.

Conformity assessment is the term given to techniques and activities that ensure a product, process, service, management system, person or organization fulfils specified requirements. Examples of these techniques and activities include assessment, auditing, calibration, evaluation, examination, inspection, and testing which can result in a supplier's declaration of conformity, certification or accreditation. The ISO Committee on Conformity Assessment (**CASCO**) is the committee responsible for conformity assessment in ISO. CASCO develops policy and publishes standards related to conformity assessment, but it does not perform conformity assessment activities.

Conformity assessment activities should follow the requirements contained in the appropriate International Standards developed by CASCO, to ensure consistency worldwide and facilitate cross-border acceptance of results, making regional and international trade easier. The World Trade Organization (WTO) Technical Barriers to Trade (TBT) Agreement requires WTO members to use International Standards or guides issued by international standardizing bodies as a basis for national procedures for conformity assessment.

By relying on conformity assessment in accordance with International Standards, regulators and the market can be assured that claims of conformance in relation to the products, processes, services, management systems, persons or organizations are well-founded and legitimate. In addition, it assists in avoiding regulation that may add unnecessary costs to the economy and reduce competitiveness of domestic production, and that may be substantially different to those in other economies which can lead to technical barriers to trade.

3.2 The situation today

The ISO capacity building unit provides classroom training and virtual instructor-led training (VILTs) sessions on the use of conformity assessment activities and tools as well as on the implementation of some ISO/IEC CASCO standards to the different players in the quality infrastructure systems of ISO's developing country members.

In 2019, the ISO capacity building unit, in collaboration with the CASCO Secretariat at ISO/CS, had organised two regional on-site training sessions on the fundamentals of conformity assessment and the CASCO toolbox for ISO's developing country members. These training sessions took place over three days. The following main topics were covered during these training sessions:

- Quality infrastructure
- WTO TBT Agreement
- Conformity assessment and functional approach
- CASCO toolbox
- Conformity assessment tools to support public policy³
- Conformity assessment standards and schemes
- Accreditation,

These topics are also used separately and in a different order in the various on-site and virtual ISO conformity assessment capacity building activities.

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 a self-paced eLearning course on the fundamentals of conformity assessment and the CASCO toolbox.

The eLearning course should provide information and explanations on key aspects of conformity assessment and is intended for use by anyone with some basic knowledge of conformity assessment.

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 training material (see Annex A) as a basis.

3.4 Overall objectives of the eLearning course

By the end of the eLearning course, the learners should be able to:

- a) Provide a basic understanding of the quality infrastructure and the fundamentals of conformity assessment as well as the different conformity assessment activities and their appropriate use.
- b) Develop a basic understanding of the CASCO toolbox and its benefits to the various stakeholders.
- c) Illustrate the articles of the WTO TBT Agreement that deal with conformity assessment procedures and how they are essential for international trade to avoid unnecessary barriers to trade.

³ This module is being developed by the ISO SMEs (about 25 - 30 slides) and isn't included in Annex A.

- d) Describe the use of conformity assessment by regulators in various regulated sectors around the world.

3.5 Target audience

The self-paced eLearning course should primarily target the following:

- a) NSB staff directly involved in conformity assessment who need to get an overview of the basics of conformity assessment in order to get a better understanding of how conformity assessment works in practice.
- b) Regulators to know how conformity assessment can help them to ensure that products and services comply with regulations.
- c) Industry to know how conformity assessment can help to facilitate market access.
- d) Members of the National Conformity Assessment Mirror Committees to get an overview of the CASCO toolbox and how it can be applied.

3.6 Scope of services

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

3.6.1. In-scope services

The Supplier will be responsible for all the activities associated with the instructional design and development of the eLearning course using the training material provided by ISO in English (see Annex A) as well as updates and additional resources to be provided by the two ISO Subject Matter Experts (SMEs).

The instructional design approach/model of the self-paced eLearning course, to be applied by the Supplier, should be aligned with the learners' needs and the overall objectives. 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. Below are the vital features that should be considered for the design and development self-paced eLearning course by the Supplier:

- 1) Applying the most effective instructional design strategy and selecting the right learning modality to transmit the message.
- 2) Describe the learner experience design that enable the learner to achieve the desired learning outcome in a human centered and goal oriented way.
- 3) Ensuring that the learning objectives, instructional strategies and assessments are aligned.
- 4) Applying modular design approach for dividing the content into small discrete modules that are independent, modular, reusable and typically short in duration.
- 5) Be interactive, easily navigated and delivered in English language across multiple electronic devices, from desktop computers and laptops to tablets.
- 6) Ensuring the content and navigation flow in a logical and user-friendly pattern so learners can spend time retaining the messages,
- 7) Using a mix of interactive formats for content presentation to address varied learner profiles and learning styles such as scenarios-based learning, knowledge check and formative and summative assessment questions, interactive pdf resource materials ... etc.
- 8) Providing mock-ups and prototype of each type of learning modality for review prior to the production of alpha outputs.
- 9) Including the social learning aspect through discussion forums or other channels so that the learners can share their problems, experiences and solutions.

- 10) Applying a visual design style that is aligned with the new ISO brand and style.
- 11) Applying the Level AA of Web Content Accessibility Guidelines 2.1 while designing the eLearning content to create an inclusive environment that assures effective learning for all.

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

The eLearning course shall be developed using a common cloud-based eLearning authoring tool such as Articulate 360 (our preferred option) using Storyline or Rise 360. Upon signing off on the project deliverables, the Supplier is required to turn over to ISO the final individual SCORM files (one SCORM file for each topic) and the editable version of the course, as well as all the visual and audio assets used throughout the course.

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 around 4 hours, taking into account the duration of the on-site training sessions (mentioned in clause 3.2) as well as the complexity of the subject areas and the interactive components of different learning activities.

The estimated time (4 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.

3.6.3. Project deliverables and timeline

The tentative timeline for the development of the self-paced eLearning course is described in table 4 below. The Supplier must inform ISO whether the proposed timeline is feasible or if an adjustment should be considered.

Table 4 – Project deliverables timeline

Deliverable type	Description	Timeline
Project proposal and plan	A document which contains the instructional design approach for the course development activities and detailed timeline (see clause x)	No later than 27 June 2024
Project contract	The draft project contract is signed by the Supplier and ISO	Before end of July 2024
Instructional Design Document (IDD)	A document which provides a framework that guides all key individuals involved in the eLearning development process. It answers questions such as: <ul style="list-style-type: none"> ▪ What is the purpose of the course? ▪ Who is the audience? ▪ What are learners expected to know/do at the end of the course? 	August 2024

Deliverable type	Description	Timeline
	<ul style="list-style-type: none"> ▪ How will learners access and navigate the course? ▪ What instructional strategy will be adopted? ▪ What is the proposed learning experience design for this course? ▪ What are the interactive elements used? ▪ How will learners be assessed? 	
Content outlines and Storyboards	Content outlines, storyboards and prototypes are developed for ISO review are signed off prior to the start of the development stage	August – December 2024
Alpha and Beta versions of the modules outputs	The modules outputs are shared with ISO for review are signed off prior to the start of testing stage	January – March 2025
User Acceptance Testing (UAT) results	UAT is conducted before the go-live decision is taken where the Supplier resolve the issues encountered during testing and prepare the Gold submissions of the course modules	April 2025
Final project deliverables package	<p>This package includes:</p> <ul style="list-style-type: none"> ▪ A SCORM package that contains all the modules files to upload them into the ISO Digital Learning Platform. ▪ Visual assets include but are not limited to fonts, icons, graphics, images, and animations. ▪ Audio assets include but are not limited to voice recordings, music, and sound effects. 	May 2025
Project sign-off document	A document that signifies ISO's acceptance of all project deliverables, primarily the final version of the eLearning course	May 2025

3.6.4. Supporting documents

ISO will provide the Supplier with access to the ISO Project SharePoint for further supporting documents in addition to the attached PowerPoints for the development of the eLearning course.

3.6.5. Out of scope services

The following services are out of scope of this project:

- a) Major revision to the eLearning course 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) Translation of eLearning course into other languages. However, this can 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 5 below.

Table 5 – Service levels for each subject area/part

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

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 course 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. **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 be employed by the Supplier and shall include at least the following:

- a) **Project Manager** – 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 Designer** – This person is responsible for conducting the learning needs analysis, instructional design strategy as well as storyboarding and audio scripting.
- c) **UX/UI Designer** – 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 chunking, a clear purpose of each activity and slide, the sequence of the content, motivational element (i.e. progress bar or badge, etc).
- d) **Graphic Designer** – This person is responsible for the production of all visual assets, such as photos, icons, graphics, infographics and animations.

- e) **eLearning Developer** – This person is 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 Learning Management System (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.

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 **one hundred thousand Swiss franc (CHF 100'000)**. 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 project deliverables. The proposed contract payment modalities shall be as follows 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 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 B 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 it should be delivered.

5.2 Supplier's profile

a) History

The Supplier shall provide a 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 (if applicable).

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 on-going 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) What is the learner experience design proposed for this course?
- 3) How the proposed learning activities/solutions are aligned with the eLearning objectives, training level and the diverse target audience (see clauses 3.3 – 3.6)?
- 4) 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).
- 5) The pros and cons of designing and developing the eLearning course using Articulate Storyline 360 vs. Articulate Rise 360 and the impact on the project cost and schedule.
- 6) The proposed quality assurance approach with regard to the different types of service requirements as referred to in the RFP.
- 7) 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 will not be addressed in the company proposal.

d) ISO involvement

The Supplier shall describe the support required from the ISO to perform this project successfully and the estimated working days of the two ISO 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 Annex C and Annex D 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 payment terms are 30 days from the date a correctly detailed invoice is received (see clause 3.9). The Supplier shall 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.

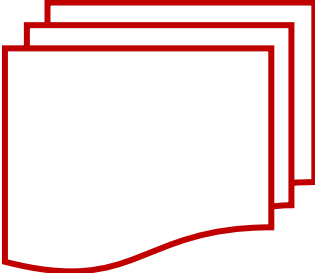
5.8 Additional relevant information

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

Annex A

ISO training material

The ISO training material can be accessed via the link below.



Annex B

Bid declaration form

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



Annex C

Compliance sheet for pre-qualification criteria

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



Annex D

Compliance sheet for professional and technical capacities criteria

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

