**Lebanese Red Cross**



**ANNEX 3: TERM OF REFERENCE (TOR)**

LMS – Learning Management System

October 18, 2022

Table of Contents

[1 Introduction & Context 4](#_Toc116989056)

[1.1 Lebanese Red Cross structure 4](#_Toc116989057)

[1.1.1 Main Activities by Sector 4](#_Toc116989058)

[2 Bidder Requirements 5](#_Toc116989059)

[3 Solution Requirements LISTING 6](#_Toc116989060)

[3.1 Website Solution Requirements 6](#_Toc116989061)

[3.1.1 General Requirements 6](#_Toc116989062)

[3.1.2 Customer Experience 6](#_Toc116989063)

[3.1.3 Technical Requirements 6](#_Toc116989064)

[3.2 Solution Functional Requirements 7](#_Toc116989065)

[3.3 Key Experts Requirements 9](#_Toc116989066)

[4 Proposal Submission - Format 12](#_Toc116989067)

[4.1 Cover Letter 12](#_Toc116989068)

[4.2 Management Summary 12](#_Toc116989069)

[4.3 Assumptions 12](#_Toc116989070)

[4.4 Deployment Options 12](#_Toc116989071)

[4.5 Licensing Options 12](#_Toc116989072)

[4.6 Licenses Versions 12](#_Toc116989073)

[4.7 Product Roadmap 13](#_Toc116989074)

[4.8 General & Functional Requirements 13](#_Toc116989075)

[4.9 Project Management Methodology 13](#_Toc116989076)

[4.10 Implementation Plan 14](#_Toc116989077)

[4.10.1 Project Plan 14](#_Toc116989078)

[4.11 System Administration 15](#_Toc116989079)

[4.11.1 Resilience and Recovery 15](#_Toc116989080)

[4.11.2 Security 15](#_Toc116989081)

[4.11.3 System Management 15](#_Toc116989082)

[4.11.4 Infrastructure Requirements 15](#_Toc116989083)

[4.11.5 Hardware & Network – only for On-Premises 15](#_Toc116989084)

[4.12 Training 16](#_Toc116989085)

[4.13 Support 17](#_Toc116989086)

[4.13.1 Pre-implementation 17](#_Toc116989087)

[4.13.2 Support Agreement 17](#_Toc116989088)

[4.13.3 Support Procedures 17](#_Toc116989089)

[4.14 Additional Information 17](#_Toc116989090)

# Introduction & Context

## Lebanese Red Cross structure



### Main Activities by Sector

* **DMS: Disaster Management Sector** the sector started just after the Syria crisis, and refugees support used to be the core of sector activities and programs. Later, and as the economic crisis hits in Lebanon and the COVID-19 situation evolved, the sector expanded its operation to include all economically vulnerable communities in Lebanon, displaced Syrians, Palestinian refugees, and vulnerable Lebanese.

Red Cross supported hundreds of thousands of people affected by Beirut Blast, with medical treatment, shelter, and psychological support.

Main programs of DMU are: Economic Security, WASH and Shelter.

* **EMS: Emergency Medical Service** Provides ambulance services across Lebanon.
* **DRR: Disaster Risk Reduction** the main focus of DMM is to reduce or prevent the risk of disaster by focusing on community resilience.
* **BTS: Blood Transfusion Sector** Collects blood units and distribute them to the hospitals.
* **Youth:** Organizes public gatherings for children, environment support campaigns and activities, and sessions to support elderlies.
* **MSS:** Medico Social service Provides primary healthcare and medicine through 3 mobile medical units and 4 fixed primary health centers in and around the blast area.

# Bidder Requirements

The below conditions are mandatory. The bidder who fails to satisfy any of the below conditions will be disqualified from the bidding process.

* The vendor must be a world class solution provider with more than 10 years of experience.
* The vendor must have a regional presence in at least the Middle East and GCC areas.
* Vendor should have permanent team based in Lebanon. Submit sample CVs (bi-lingual).
* The vendor must be recognized by major consultancy firms and industry analysts such as Gartner.
* The vendor must have at least 20 implementations in the Middle East and GCC areas.
* The vendor must have successfully implemented 3+ NGOs Projects in Lebanon.
* The vendor must be able to offer direct support to its clients in Lebanon.
* The vendor must be certified by the manufacturer of all proposed software components.
* The short-listed bidders must provide a Proof-of-Concept (POC) to demonstrate the proposed solution with the required details.

# Solution Requirements LISTING

3.1 Website Solution Requirements

|  |
| --- |
| General Requirements |
|  | The solution should be based on open source LMS and a digital experience platform. |
|  | The solution should be fully bilingual (English and Arabic) for users and administrators in Content, Container (interface) and search engine. The solution must be provided in a single copy with the users capable of switching between Arabic or English language depending on their preference. |
|  | The solution should be appealing, professional, and easy to navigate. |
|  | The solution should be coupled with a “training program” in order to transfer the knowledge and Know-how to the computer department at LRC. |
|  | The bidder must provide trainings to cover administrator training for routine administration tasks, as well as application generation and customization. |
|  | The bidder must provide maintenance and support services for all of the solution components. |
|  | The solution must be compiled with full documentation (admin guide, technical documentation, training material). |
| Customer Experience |
|  | The solution must be simple, yet powerful, and easy to use thus providing a unique customer experience. |
|  | The solution shall support user-friendly interface providing accessibility to LRC’s functionalities using intuitive menus and actions. |
|  | The solution must be facilitating interaction with clients to improve our quality of service to them. |
|  | The solution shall have a help module. |
|  | Clients must be able to share News/Content on social media.  |
|  | The solution should be able to issue alerts (emails, messages) and notifications based on configured rules and criteria.  |
| Technical Requirements |
|  | The bidder must have the capability to work with any Major LMS and CMS technology  |
|  | The solution must have comprehensive security features that forbid unauthorized access to vital system resources. Vendors should describe their capability. |
|  | The solution shall be built using an application builder which contains:* User management
* Forms generation
* Menu management
* Multi-language with dictionary management
* Database connection management
* Workflows
* Reporting

Document management |
|  | Compatibility with all browsers across all platforms.  |
|  | Compatibility with mobile web access technologies for a responsive access to the portal from mobile devices. |
|  | The solution must be flexible to integrate with any type of database. |
|  | The solution should have a modular design and infrastructure. |
|  | The solution should be scalable to support increasing number resources and number of users. |
|  | Ability for all portal components to run on well-known, international standard, operating systems. |
|  | The solution must be able to integrate with social media. |
|  | The solution must support user accounts and membership management. |
|  | The vendor must specify the hardware and software specification for:* Production Environment
* Staging Environment

Disaster recovery |
|  | The solution must integrate with a Payment Gateway. |
|  | Should be able to auto adjust streaming based on the available bandwidth.  |

## Solution Functional Requirements

|  |  |
| --- | --- |
|  | The solution must allow creating assignments for learners to submit assigned work before completing the course. |
|  | The solution must allow creating and storing test questions in a question bank to reuse the questions across multiple tests in multiple courses. |
|  | The solution must allow creating surveys to collect learners' feedback. |
|  | The solution must allow setting evaluation criteria and framing a scoring strategy to measure learners' performance in assessments and discussions. |
|  | The solution must allow building various tests with options such as multiple-choice, drag-and-drop matching, ordering, fill-in-the-blank, open-ended questions, essay questions, etc. |
|  | The solution must allow capturing and uploading video files to submit assignments. |
|  | The solution must allow adding, editing, or removing announcements directed toward a specific group of employees or the entire organization. |
|  | The solution must offer discussion boards, also known as discussion forums or message boards that enable discussions and knowledge exchange among users for lessons in a course. |
|  | The solution must allow sharing of files and content with others. |
|  | The solution must allow communicating with multiple people or an entire class in a group chat. |
|  | The solution must support two-way messaging for communication among learners and between learners and instructors. |
|  | The solution must allow assigning courses to learners or vice-versa. |
|  | The solution must offer course catalogs that allow displaying a list of all the available or upcoming courses. |
|  | The solution must send reminders to learners for the due date for completing a course. |
|  | The solution must allow learners to rate courses for the lessons they take. |
|  | The solution must allow creating learning paths by organizing courses that enables learners to take them in a sequential way. |
|  | The solution must allow scheduling a specific date to release parts of a course. |
|  | The solution must allow creating or customizing prebuilt certificates with background images, logos, and text that are awarded to learners on course completion. |
|  | The solution must allow building lessons by uploading existing content from local disks, including Microsoft Word and Excel documents, PDFs, PowerPoints, videos, etc. |
|  | The solution must allow setting time limits for learners to complete a course. |
|  | The solution must allow setting prerequisites in the courses to prevent learners from proceeding to the next lesson before completing all the required tasks in the current lesson. |
|  | The solution must enable monitoring of learners' progress on the assigned courses through a dashboard or a progress report. |
|  | The solution must allow adding courses to enable learners study at their own pace and location. |
|  | The solution must allow adding both in-person classroom and self-paced training courses. |
|  | The solution must allow sharing interactive whiteboards in live sessions to collaborate with learners. This to be done via integration of Microsoft Teams. |
|  | The solution must send invites to learners for the sessions or events through emails, SMS, or WhatsApp or any other messaging platform. |
|  | The solution must allow recording virtual classroom sessions to be done via integration of Microsoft Teams. |
|  | The solution must offer a customizable dashboard to monitor and analyze various aspects of learner performance by generating graphs, performing calculations, and tracking KPIs. |
|  | The solution must offer custom reports allowing users to apply filters to drill down into data and create a report from scratch. |
|  | The solution must offer pre-built reports related to learners' performance and progress per course, course enrollment and completion, learning time spent per course, etc. |
|  | The solution must provide users with a consistent experience on any device with a fully responsive web-based platform. |
|  | The solution must allow tracking revenue and viewing purchase history. |
|  | The solution must allow bundling courses that group multiple courses or training products together and is sold as a single unit. |
|  | The solution must enable offering discounts, coupons, or promo codes to courses. |
|  | The solution must allow selling and managing subscriptions to courses. |
|  | The solution must allow selling training materials and courses online. |
|  | The solution must allow creating groups of learners and assigning courses to the group. Learners can belong to multiple groups. |
|  | The solution must allow creating users' profile that provides users detail information such as name, contact, email address, country, city or town, etc. |
|  | The solution must offer leaderboards that showcase the number of points earned by learners, the top learners with the highest score, etc. |
|  | The solution must allow creating roles, defining access permissions for different roles, and assigning them to users. |
|  | The solution must allow viewing course transcripts that include enrollment information and course status such as in-progress, completed, not started, credits earned, badges, certificates, etc. |
|  | Before login the user can see trailer, course content, small description, trainer name, schedule, etc. Should allow text, images, videos, etc. |
|  | People that can attend courses:* Either public user if the course is public

Private courses can be either small group of people or courses for LRC members |
|  | For internal users (LRC members), there will be a career path prefixed that they need to follow in order to be eligible to train. This career path is set by the Admins. They cannot register their courses, the courses are assigned to them |
|  | Courses can have certificate that user can download once the trainer assign them as succeeded. For internal users, courses set as succeeded will grant them the ability to be assigned to a later course |
|  | Internal users belonging to stations should be created by the station -> Admin will then approve the users and set their career path -> Stations can see reports concerning the users they created (User status, Course status by user) |
|  | Courses must have the following: Content, Exams, Assignment, Experimental Questions (Appearing in exams but are not graded), Integrated Online course (Connection with Microsoft Teams), Attendance Sheet, Trainer Attendance check-in/check-out. |
|  | In the User Management module, public users will create their account with minimum details (Name, Last Name, Email, Phone). If Email is provided, we verify by email and if the phone number is verified, we either verify by WhatsApp or SMS. Admins can change roles and make students become trainers. |
|  | Should be able to manage courses, learners and trainers. |
|  | The solution must be able to support SCRUM process for course generation. |
|  | Need to manage opportunities, and training paths for internal users, public users and external organizations. |
|  | Should allocate users automatically and assign to selected courses. |
|  | Learners can be allocated to multiple training paths in multiple departments and the solution should take into account common courses (user should need only take the course once). |
|  | Need to track learner’s information, courses, certificates, payments, etc.  |
|  | Training paths, pre-requisites, tokens, etc. can vary by station.  |
|  | Can generate QR code by station. |
|  | Should keep track of a learner’s number of attempts for passing a course. |
|  | Offer on premise and online courses which can be purchased online. |
|  | Teachers’ hours should be tracked and converted to payment based on preset formula and teacher’s experience.  |

## Key Experts Requirements

|  |  |
| --- | --- |
|  | The bidder must offer a qualified expert team for the completion and successful delivery of this project. |
|  | The bidder must describe the responsibilities and qualifications of the proposed team members in details.  |
| **The bidder must provide the minimum resources listed below and comply with the mentioned requirements:** |
| **Project manager** |
|  | PM must be responsible for Project management, including project reporting, project plan updates, change requests, incident requests and weekly progress meeting. |
|  | Project manager must be responsible for specifications management, while ensuring deliverables according to the project specifications and project plan schedule. |
|  | PM must hold a degree in Computer Science or equivalent with a minimum experience of 7+ years in the software field. |
|  | Bidders must provide detailed CV highlighting past experience and key achievements in a similar environment with credible references. |
| **Business Analyst** |
|  | BA must be responsible for conducting frequent meetings for requirement gathering and responsible for business requirements analysis. |
|  | BA must be responsible for documenting collected requirements as part of the statement of work. |
|  | BA must hold a degree in Computer Science or equivalent with a minimum experience of 7+ years in the IT application and software fields and minimum 5 years of relevant experience as business analysis. |
|  | Bidders must provide detailed CV highlighting past experience and key achievements in a similar environment with credible references. |
| **Technical Team Leader** |
|  | The team leader should lead a team of software Engineers in the creation of high-quality software within agreed project deadlines. |
|  | TL must be responsible for allocating technical resources when needed. |
|  | TL must be responsible for making important technical decision as he/she is the main technical reference on the project. |
|  | TL must hold a degree in Computer Science or Engineering with a minimum experience of 5+ years in the IT application and software fields. |
|  | Bidders must provide detailed CV highlighting past experience and key achievements in a similar environment with credible references. |
| **Software Engineer** |
|  | SE must be responsible for customizing the various modules, based on the detailed project specifications. |
|  | SE must be responsible for project implementation, testing and integration to meet the customer’s needs. |
|  | SE must have extensive knowledge of programming concepts and design. |
|  | SE must hold a degree in Computer Science with a minimum experience of 3+ years in the IT application and software fields. Additional certifications are a plus. |
|  | Bidders must provide detailed CV highlighting past experience and key achievements in a similar environment with credible references. |
| **Quality Control Expert** |
|  | The QC must be responsible to develop test plans, test cases, test scripts and test reports, perform testing on various software, systems and reporting systems and validate that user expectations are achieved during the testing process. |
|  | QC must hold a degree in Computer Science or equivalent with a minimum experience of 5+ years in the IT application and software fields with minimum 3 years of experience as Quality Control/Assurance Analyst or Tester role… |
|  | QC must ensure that defects uncovered in the test are recorded, summarized and utilized in post project reviews in an effort to improve the development and test processes. |
|  | Bidders must provide detailed CV highlighting past experience and key achievements in a similar environment with credible references. |
| **Graphic Designer** |
|  | The Graphic Designer must have extensive experience in Website Concept, Themes, Graphics Design and Optimization, E-services, Newsletter, Forms, Reports, Ads, Advertising Banners, Graphical User Interfaces (GUI) Design and Implementation. |
|  | The Graphic Designer must be responsible of designing the software interface with its different components. |
|  | The Graphic Designer must hold a bachelor degree in graphic design or equivalent with a minimum 5+ years of experience as graphic designer. |
|  | Bidders must provide detailed CV highlighting past experience and key achievements in a similar environment with credible references. |

# Proposal Submission - Format

Technical Proposal should include all the following with the relevant documents

## Cover Letter

The proposal should include a cover letter signed by the authorized representative of the Supplier.

## Management Summary

Supplier should designate in this paragraph, its authorized representative that should sign the proposal. Additionally, this paragraph should include the names of individuals who are authorized to negotiate with LRC and name the Supplier’s sales representative.

## Assumptions

List the assumptions that have been made throughout the proposal. Where possible, cross-reference each assumption listed with the part(s) of the proposal that are directly affected by that assumption.

## Deployment Options

In this section of the response document, Suppliers should describe the proposed deployment method(s):

* On-Premises deployment
* On Cloud deployment
	+ Single Tenant hosting
	+ Multi-Tenant hosting

Even though LRC prefers an On-Premises deployment to be in line with the strategic orientations of all LRC applications, it is open to alternative deployment methods as long as the choice is well justified by the Supplier and based on clear argumentation to answer LRC requirements.

Supplier should also communicate and describe the available environments (development, testing, pre-production, production, etc.)

## Licensing Options

Explain the basis of the Software Licensing (e.g. per user, per module, per Business unit, per host …).

Define what principle is used: Concurrent users, module users, generic users, categories, etc. Would LRC incur any additional license for development, testing, and training environments?

## Licenses Versions

Suppliers should provide an overview of the new base software components required in the proposed solution, specifying core functionality and purpose of the components.

Provide at least the following information for each of the software categories (Please adapt content to vendor information structure):

* Name
* Current version number
* Date version released
* Functional description

**Software categories**

* Development environment (testing, data conversion)
* Training environment
* Application software (production base)
* Database management software
* Etc.

Suppliers must provide details of customizations to be performed to the base products.

## Product Roadmap

Provide details on the future roadmap of the product with supporting documents.

## General & Functional Requirements

Suppliers are asked to respond to each detailed requirement specified in **Compliance Matrix Checklist attached in the ITB document** using the structure and format set out below.

The response should enable LRC to form a clear understanding of:

* Functionality provided by the proposed solution
* Base software components required to provide the proposed functionality
* Enhancements needed to provide the proposed functionality
* The compliance of Suppliers’ proposed solution

Please note that Supplier response to these flows will be considered binding and will be used in the project Terms of Reference/FWA and all scope related discussions during the implementation.

## Project Management Methodology

A comprehensive Project Management methodology is essential for a successful implementation project. Given the scale of LRC environment and level of complexity the bidders perceive, they are requested to provide detailed information about the Project Management methodology they will follow should they be awarded the project.

The methodology should address at a minimum the following areas:

* **Scope and Milestone Management**: Suppliers are requested to provide a Work Breakdown Structure.
* **Structure for the work plan** they are proposing, with a complete listing of the project deliverables.

Deliverables should include at a minimum:

* Documentation of the Functional Requirements
* Documentation of System Design and Architecture
* Documentation of all customizations and modifications
* Sample User Acceptance Testing Scenarios
* User Acceptance Testing Results Documentation
* User and administrator manuals

* **Risk Management**: The mechanism by which the Suppliers team would be assessing risks in the project, and the mitigation steps required to be implemented.
* **Issues Resolution Management**: the mechanism by which the Supplier’s team would be addressing emerging issues in the project, and what escalation procedures are available for LRC in case of issues identified from within the Supplier’s team.
* **Communication Management**: LRC expects progress updates via meetings to be held with the implementation team, progress reports to be circulated and Key milestones meetings with Projects sponsors (steering committee).

Suppliers are to provide their recommendations as to the frequency of reporting, and the communication channels open to LRC with the Supplier’s Senior Management.

## Implementation Plan

Suppliers are expected to provide relevant details at sufficient granularity for LRC to compare and evaluate the overall implementation plan and Supplier’s experience and readiness to undertake the project.

LRC envisages a phased approach to this implementation but leaves the definition of phases and the implementation strategy to Suppliers. Suppliers should provide the implementation strategy and propose all necessary details for LRC to understand and evaluate the implementation plan.

### Project Plan

Provide a plan of the tasks/activities required and associated start and finish dates. Deliverables, dependencies, and milestones should be indicated and described:

* An overall high-level plan covering all phases with timelines and effort estimate.
* For each phase of the implementation, Supplier should provide a detailed project plan. Describe clearly the services that will be provided during implementation including installation, configuration, testing and cutover.
* For each task identify the number of resources required, the Supplier role, LRC role, risks, and dependencies, if any.

## System Administration

The proposal should provide the details requested about the administration of the system in the proposed solution.

### Resilience and Recovery

Describe the attributes of the solution that will provide high availability, preventing downtime during live operations.

### Security

Describe the security elements of the proposed solution and explain their use and operation.

Security should address:

* Restricted access to system functions
* Restricted access to information
* User / System activity audit
* Encrypted storage of information
* Transaction audit

### System Management

Describe how the proposed system is managed, including:

* Performance monitoring and optimization
* Problem reporting and diagnosis
* Database management
* Software upgrades and patch releases when applicable

### Infrastructure Requirements for SAS solution

For the SAS solution, suppliers should list the infrastructure requirements:

* Supported web browsers
* Network requirements
* Etc.

### Infrastructure Requirements for On-Premises

Only for On-Promise installations, the Suppliers are requested to specify the required hardware to implement their solution successfully at LRC, by providing specification and configuration of the recommended platform.

Suppliers should consider provisions for the following environments and scenarios:

* Development Environment required
* Testing Environment required
* Production Environment required in:
	+ Standard configuration (single Application Server, single Database Server, etc.…)
	+ High-Availability configuration (Load Balancing/Clustering)
	+ Disaster Recovery configuration (DR site in a remote location)

Identify which hardware will be required for systems development and can be subsequently used in production systems. Provide the following information for each hardware category.

Provide details of the sizing calculations for proposed performance, memory size, and storage type and capacity, and indicate how increases in business volumes will impact these attributes.

* Type (PC, printer, server)
* Description of function/purpose
* Manufacturer
* Model identification
* Operating system software
* Performance (processor speed, line speed, printing speed, display resolution)
* Memory size
* Storage type and capacity
* Connectivity

For the production hardware configuration, provide details of how the configuration can be adapted and expanded to cater for changing and growing business needs.

## Training

Supplier should identify what training is required for LRC staff for each part of the solution to secure the good monitoring and operation of the LMS implementation; a clear description of the offered trainings should be provided as part of the answer.

At a minimum, the following training programs are required:

* System Administration Training
* Super User Training
* End User -Train the Trainer- Training for each implemented module

For all training, provide details of:

* Location
* Objective
* Duration and timing of sessions
* Structure and content of sessions
* Numbers of trainers at sessions
* Method i.e. Train the trainer

## Support

LRC requires that Suppliers provide support before, during and after the completed roll out of the full proposed application system to be included in the implementation project.

Provide the following details for base software and enhancements:

### Pre-implementation

Detail pre-implementation approach & facilities which would be made available for system familiarization, training and testing.

### Support Agreement

Identify clearly all of the different lines of support applicable. For each line of support provide the following details:

* Standard hours of support
* Additional hours for support
* Location of support offices
* Number of employees at support locations able to provide relevant support to LRC
* Method of communication used for support
* Service Level agreements including response time to helpdesk requests

### Support Procedures

Provide a description of how support procedures will operate, including severity rating of problems, handling and problem escalation process, including acknowledgement and fix time based on severity level.

* Remote
* On-site for critical issues
* Web based
* Telephonic

## Additional Information

Provide any additional information not requested in other sections and considered relevant. Also, list any document forming part of the proposal as additional information under separate enclosures.