

Specific Conditions
- STATEMENT OF REQUIREMENTS -

For the Development and Delivery
of an Online learning resource for
STICHTING PROSAFE

August 2009

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1. Introduction

This document outlines the specific conditions (Statement of Requirements) for an online learning resource pilot that Stichting PROSAFE intends to deliver as part of the “Enhancing Market Surveillance through Best Practice II” (EMARS II) project, which is an EU Commission funded project.

The online learning resource will be designed for both market surveillance officials and businesses inside and outside the European Economic Area (EEA) and accession countries to enhance and enforce consumers’ safety.

The online learning resource will also be used to train new market surveillance officials and to provide documented continuous professional development for experienced officials.

The online learning resource will deliver training on the EEA and individual member country directives, regulations, compliance, business and product safety legislation, and requirements for selling products into and across EEA countries.

The online learning resource is initially being developed to deliver training and knowledge for regulatory/market surveillance officials. EMARS II proposes to then work with partners, to enhance and further develop this online learning resource to deliver training and education to businesses, management and staff in companies owned and operated outside of the EEA.

2. Background

The EMARS project has identified in its training strategy the need for an online learning resource which should deliver:

- **blended and flexible training** that caters for flexible working patterns provided by classroom training, e-learning and distance learning using workbooks;
- a training programme that blends classroom training with practical training for staff who can **undertake operational work during the training programme**;
- a flexible training programme that **reduces the amount of time spent in fulltime training**;
- user accounts with varying **levels of access** for potential business/consumer access to learning material; and
- 24 hour access 7 days per week.

3. The Requirements

This document sets out the specific conditions to tenderers for this EMARS II online learning resource to provide training delivery in EEA member states and accession countries.

It additionally identifies **desired** enhancements that will also complement the EMARS learning materials and available databases.

3.1. Online secure website and training solution

- Website visual design
- Development of the e-learning resource centre solution
- Hosting and technical support of the online learning resource
- Development, production and provision of a Helpdesk service
- Production and maintenance of user and system documentation and manuals
- User account set up, including issuing login and passwords.

3.2. Delegates and training audience

The EMARS II online learning resource pilot must provide training for:

- market surveillance officials;
- customs authorities;

It will be further developed after the pilot stages to provide materials for business and consumer associations.

3.3. Subject areas

To develop and deliver via a web based learning, materials suitable for use by Market Surveillance Officials and businesses in all EEA member states addressing subject areas of;

- The requirements of the General Product Safety Directive
- Toy Safety
- External Stakeholders: - Basic Compliance information set out in the corrective action guide, a directory and database.

Each of these three subject areas will be developed and delivered as a separate and distinct interface and user view of the online learning resource.

Refer to section 7 of this tender for further details of the required content.

3.4. Content

3.4.1. Initial development and supply

The contractor will undertake development and production of the online learning resource content.

The contractor will undertake development and production of all training content and materials.

The contractor will undertake maintenance, revision and updating of these materials for the period of contract.

3.4.2 Time frame for delivery

There will be a piloted staged approach to the delivery of the online learning resource.

Stage 1: to be delivered by the end of March 2010 for a period of X months

- The requirements of the General Product Safety Directive;

Stage 2: to be delivered by the end of July 2010 for a period of X months

- Toy Safety;

Stage 3: to be delivered by the end of November 2010 for a period of X months

- External stakeholders: Basic compliance information and a directory and data base.

3.4.3 Content management transition

Stichting PROSAFE will take ownership of the delivered training content and materials.

At that time the contractor will be required to supply all content materials to Stichting PROSAFE.

The contractor will be required to provide mechanisms and processes to update and add new content and training materials to the online learning resource system during the course of the pilot.

Refer to Sections 8 and 9 of this tender for more detailed requirements.

3.5. Project management and administration

The contractor will provide the necessary project management to plan, co-ordinate and manage all its activities and responsibilities to ensure delivery of all stages of this project to the required time scales.

The contractor will provide the necessary management and administration to work with the EMARS II project to ensure provision of the required Service Level Agreements for all post-delivery activities.

3.6. Budget

The estimated budget for the whole project (Stages I, II & III) should not exceed €60,000.

4. Criteria for selection

- 4.1.1. The successful contractor will need to demonstrate and confirm they understand this proposal and requirements.
- 4.1.2. The contractor will be required to supply and make available all training content and source materials to Stichting PROSAFE.
- 4.1.3. Stichting PROSAFE will have ownership of the EMARS II e-learning system content.
- 4.1.4. For the period of this pilot, the contractor will undertake management and updating of the content
- 4.1.5. The ownership for management of all online learning resource materials and training content will transfer to Stichting PROSAFE at sometime after delivery of stage 3 of this Pilot.
- 4.1.6. EMARS II expects that the online learning resource will be based on the successful contractor's own existing online learning resource product.
- 4.1.7. The successful contractor should have a proven track record in, and knowledge of, regulatory services, market surveillance and enforcement.
- 4.1.8. The contractor will need to demonstrate where the expertise to deliver the online content will be sourced.
- 4.1.9. The successful contractor will also need to demonstrate their legal capacity and financial capacity to deliver the above requirements.

5. Costings

Details of costing are required to cover design, development, production and support and maintenance of the online learning resource.

Suggesting headings for providing this information are identified below, outlining the information required.

5.1. Costings for online learning resource and training materials.

For each of the three pilot stages:

5.1.1. One-off design and development costs

- For the online learning resource platform and infrastructure
- Design of the training courses and syllabi
- Training materials and content development in English
- Provision of hosting platform and infrastructure
- Provision of a Helpdesk

- Production of user and system documentation in English

5.1.2. Support Costs

Annual costings from time of delivery until the end of 2011 to provide:

- Hosting and support and maintenance of the online resource system and IT infrastructure to meet SLA requirements
- Helpdesk service
- Regular review and updating of training materials and training content
- User account and password setup and support.

5.2. Costings for subsequent services

5.2.1. Content Management

- Transfer of online learning resource content to Stichting PROSAFE
- Any additional annual support costs for these services.

5.2.2. Additional Training materials

The Contractor is required to provide costings for the development of additional materials to address specific safety legislation relevant to individual member states and in that member state's language. The requirement for these additional modules will be advised by EMARS II.

Costing information and models are required for adding additional modules for the pilot and to undertake future development work.

5.2.3. Translation Services

In the first instance the materials will be presented in the English language; but with future provision to provide the materials in French and German as required by EMARS II.

The Contractor is required to provide an estimate of costs for this.

5.2.4. Annual Support for an extended period.

A costed proposal to extend the support, maintenance and Helpdesk SLA beyond 2011. This should be priced for an extended period of:

- Annually
- A 3 year period
- A 5 year period.

DETAILED REQUIREMENTS

6. Training Materials

6.1.1. The EMARS II online learning resource pilot must provide training for:

- market surveillance officials;
- customs authorities.

It will be further developed after the pilot stages to provide materials for:

- consumer associations;
- legal compliance professionals within business;
- manufacturers, import/ export companies, distributors, suppliers and retailers;
and
- Business owners, managers and staff dealing with businesses and consumers.

6.1.2. Materials and subjects covered include:

- EEA-wide directives, regulations and compliance;
- individual member state legislation;
- standards; interpretation and use;
- market surveillance procedures;
- sampling techniques;
- consumer rights and protections;
- implementation of best practice; and
- Risk assessment, systems failure and prevention.

6.1.3. The online learning resource will deliver

- flexible training that caters for flexible working patterns through use of e-learning web-based products and distance learning using workbooks
- on-line registration for courses
- e-learning plans to direct and guide progression through a course
- a range multi-media materials to support learning, including video clips and images, case studies and scenarios
- assessment of skills and knowledge levels at various stages through a course
- automated tests and on-line feedback
- automated book-marking and tracking of student progression, so they can log out and return to the same place

- revision plans to help prepare for examinations and tests
- secure access based on user and password protection, providing various levels of access to information
- 24 hour access 7 days per week to learning
- An accredited certificate that can be produced for the student following successful completion of a course or learning module.

The training produced by the online learning resource will also incorporate European best practice guidance.

7. Learning Materials Content Specification

7.1. Three Pilot stages

This project is being implemented in stages, with 3 training content areas required, The requirement is develop and deliver via a web based application, learning materials suitable for use by Market Surveillance Officials in all EEA member states. It must provide materials for the following subject areas and stages:

7.1.1. The requirements of the General Product Safety Directive

- Purpose & Scope
 - Safety
- Market surveillance provisions
- Suppliers
- Obligations on:
 - Suppliers
 - Producers
 - Distributors
- CE mark
- RAPEX (The EU rapid alert system for all dangerous consumer products).

7.1.2. Toy Safety

- Definition
- Application
- Requirements
 - Harmonised standards
 - Notified bodies
 - CE mark
- Essential safety requirements
- Annex II of the Directive.

7.1.3. Extended stakeholders: basic compliance information and a directory and database.

- Stakeholders associated with Market Surveillance Authorities
 - Needs analysis
- Enhanced co-operation and best practices in regard to communication
- Corrective action guide.

NOTE: ALL THE ABOVE WILL TAKE INTO ACCOUNT NLF 768 - 2008

7.2. Required functionality

- 7.2.1. The materials are required to be written and presented in such a way as to offer a blended learning option for all Market Surveillance Officials engaged in product safety surveillance.
- 7.2.2. The online learning resource must be capable of supporting high levels of usage and be available at all times for Market Surveillance Officials to access (other than for reasons of technical upgrade that should be completed after office hours).
- 7.2.3. The Contractor is required to provide a helpline for users. This facility will be required to assist officials that have technical difficulties in accessing the materials; it is not expected that the helpline address issues relating to content.
- 7.2.4. In the first instance the materials will be presented in the English language; but with provision to provide the materials in French and German as required by EMARS II. The Contractor is required to provide an estimate of costs for this.
- 7.2.5. Officials undertaking learning via the online learning resource must be provided with evidence that they have undertaken the learning. Therefore an assessment tool whereby an Inspector can be assessed on the information learned and an accredited certificate must be produced for the inspector to prove his training and competence.
- 7.2.6. The Contractor is required to provide costings for the development of additional materials to address specific safety legislation relevant to individual member states and in that member state's language. The requirement for these additional modules will be advised by EMARS II.

8. Training content - development and maintenance

The contractor will undertake content development and maintenance for the period of the contract.

All content, documentation and website design and materials will be developed in the English Language.

8.1. Content Development

The required training materials and content include:

- Design, and production the courses, syllabi and learning plans
- Development and production of course materials
- Development and production of Case Studies
- Development and production of Scenarios
- Development, production of Revision Notes
- Hosting of all content.

8.2. Content Developers

A network of author experts will be needed to develop and produce the content of the EMARS II e-learning pilot.

The contractor will need to demonstrate where the expertise to deliver the online content will be sourced.

8.3. Content Maintenance and Management

The contractor will undertake maintenance and management of all training content and materials for a period of time following production and release of each stage of the pilot.

Regular review of the content and updating where necessary is required. It is expected this will be undertaken by the content developers, or by subject matter experts of equal experience. This is to be undertaken at scheduled intervals, as well as pro-actively in response to legislation changes.

Stichting PROSAFE retain the option to audit this content maintenance process throughout the life of this contract.

9. Technical specification

9.1. General principles

9.1.1. It is likely that this document will prompt further discussion and, for this reason, your bid must include a description as to how you would expect to expand our requirements in to a detailed requirements list/specification suitable for development purposes.

9.2. Design

9.2.1. We expect bidders to provide us with three design proposals for the online resource, which, upon our approval, will be worked up and developed in to a full website design.

9.2.2. Designs must include the EMARS/EU logo and/or approved text.

9.3. Construction

9.3.1. Users must not require any special browsers, plug-ins or software to access the website. The following standards must be employed:

- XHTML 1.0
- CSS version 2.0
- Compliance with the W3C WAI Accessibility Initiative – Priority ‘AA’ (Double A)
- Design to a minimum screen resolution of 1024 x 768 pixels.

9.3.2. The website must be cross-platform compatible and support the following operating systems:

- Windows
- Macintosh
- Unix
- Linux

9.3.3. The website must operate in the following major web browsers to both latest and previous versions:

- Internet Explorer
- Mozilla Firefox
- Safari

9.3.4. A separate print style sheet must be devised that correctly renders online content on to the printed page.

- 9.3.5. Wherever lists of available content are displayed as a result of a search or by browsing the contents of the system, pagination of results should be provided if the 'resultset' exceeds ten in number. The number of items in the list should be displayed at the head of the result list, together with positional information ('displaying 21-40 of 72 documents').
- 9.3.6. Information being displayed should be paginated to a suitable level to ensure the end-user isn't confronted with an excessive amount of text. It follows that suitable 'previous' and 'next' page navigation should be available where this technique is employed.

9.4. User management

- 9.4.1. We expect a range of countries to participate in the online learning pilot. For this reason, we expect you to incorporate a login process that can, in future, be used to direct such users to a country-specific version of the online resource.
- 9.4.2. It follows that each country can have zero, one or more users. We envisage user management tasks being undertaken by an overall central system administrator for the purposes of this pilot, but, longer-term, this task is likely to be distributed to country-specific administrators.
- 9.4.3. The pilot system must include a password-reset function that requires no administrative intervention. We anticipate the system will employ email messages with passwords and/or reset URL.

9.5. Hosting and support

- 9.5.1. We require the system to be hosted in a staging environment for testing purposes before we approve it for release. The delivered website will be hosted on a dedicated domain name to be determined.
- 9.5.2. We require a service level agreement that covers, in detail, hosting, support, escalation procedures and change request handling procedures. Briefly, however, our requirement is for:
- an English-speaking telephone and/or email helpdesk to assist users in their operation of the system
 - systems to be available for 99.5% of working hours measured over each calendar month
 - services to be monitored 24 hours per day, seven days per week. In the event of a warning or failure, we require a response within eight hours
 - regular system backups
 - a warranty against software engineering 'bugs'
 - an appropriate level of guaranteed bandwidth dedicated to the online resource
 - an appropriate level of security applied to the hosting environment and data
- 9.5.3. Bidders must include provision for the initial upload and ongoing maintenance of the

online material.

9.5.4. We require an English-language user-manual that details how all parts of the system operate.

9.6. Content

9.6.1. We expect the learning content to include text, images and video material. Your proposal must be capable of hosting and displaying such material.

9.6.2. We require an online glossary system that automatically highlights glossary entries that appear in content. Clicking a glossary term will display the fuller description in a pop-up window.

9.6.3. Online courses must be interactive and include the automatic marking of differing question formats:

- multi-choice
- multiple-answer selection
- order-a-list
- fill-in-a-blank

9.6.4. Tests may be optional or compulsory.

9.6.5. Tests, where they appear in courses, must be contained on a dedicated test page that prevents the user from advancing before they have answered a compulsory test.

9.7. Administration

9.7.1. We require regular reports of each user's progress through the learning material. A country administrator should be emailed a link to the website or the reports themselves on a monthly basis.

9.7.2. The report should contain a list of the administrator's users, against each of which will appear a list of case study, scenario or course material they have viewed within an administrator-defined period. The default period should be set to all (case study | scenario | course) activity within the past calendar month.

9.7.3. Those users that have not used the e-learning resource within the defined period should show as such.

9.7.4. Where possible, a graphic that indicates a user's progress through the material should appear against each of these three learning material types.

9.7.5. Course records should show the final mark the student achieved, together with their study start and end date.

NOTE:

The stored and gathered information by this administration will comply with the Data Protection controls for each member state.

Details must be given of what data can be stored and gathered by the various administrative rights.