

# **FINANCIAL SERVICES BOARD**

## **INVITATION TO TENDER FOR DEVELOPMENT OF A LEARNING MANAGEMENT SYSTEM (E-LEARNING SOLUTION) FOR ONLINE TRAINING OF PENSION FUND TRUSTEES**

### **BACKGROUND**

The Financial Services Board is a unique independent institution established by statute to oversee the South African Non-Banking Financial Services Industry in the public interest. Our vision is to promote and maintain sound financial investment in South Africa. Please visit the FSB website at [www.fsb.co.za](http://www.fsb.co.za) for more information on the FSB.

### **PURPOSE**

The purpose of these terms of reference is to request a suitable service provider to submit a proposal with regards to the development of a Learning Management System as outlined below.

### **LEARNING MANAGEMENT SYSTEM REQUIRED**

The system is required to:

- Be web based and hosted by the vendor.
- Run on the vendor's infrastructure capable to cater initially for around 15 000 trustees but scalable to 30 000 to participate in the e-learning program.
- Use e-mail addresses for trustee logins, and must keep track of their progress. They must be able to log out at any time and later proceed from the point where they logged out from.
- Facilitate learning by real life scenarios and must be based on questions asked and answered by various role players in the scenarios.
- Provide continuous feedback to trustees both in text and audio.

- Have a modular design (12 units and 36 scenarios. Please refer to the scope guidance document and index of units at [www.fsb.co.za](http://www.fsb.co.za)).
- Allow assessment of trustees after completion of every module.
- Issue every trustee with a certificate listing all modules completed successfully.
- Be modeled after the Trustee Toolkit developed by the Pensions Regulator of the United Kingdom (See <http://www.trusteetoolkit.com>).

## **DEVELOPMENT TOOL**

The tool used for development is required to:

- Be SCORM (Shareable Content Object Reference Model) compliant.
- Be widely used and well established in South Africa (and preferably internationally).

## **PROOF OF CONCEPT**

As part of the tender presentation a proof of concept must be prepared, by developing one of the units chosen from unit 1 – 4. (Please refer to the scope guidance document and the index of 12 units at [www.fsb.co.za](http://www.fsb.co.za)). The final proposal must include pricing and a time table for the project as a whole (all 12 units). The proof of concept must present scenarios as provided in the attached examples.

## **EVALUATION CRITERIA**

The following criteria will be used for the evaluation of the bid:

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| • Pricing                                | 90% |
| ○ Prices                                 | 45% |
| ○ Technical capability                   | 45% |
| • Historically Disadvantaged Individuals | 10% |

## **PRICING**

Pricing should be based on analysis, development and implementation. Pricing for hosting and ongoing maintenance and support should also be provided.

## **TECHNICAL CAPABILITY**

- Adherence to the specifications
- Ability to provide required solution (no subcontracting)
- Ongoing support
- Reference to other clients (provide at least 3 other relevant organizations that can be contacted with regards to similar projects)

## **HDI STATUS**

- Details to be completed in the vendor accreditation form

## **COMPULSORY BRIEFING SESSION**

A compulsory briefing session will be held at the offices of the FSB on 12 August 2010 at 10:00.

## **SUBMISSION**

The submission of a proposal should be forwarded to Ms Elmarie Hamman as follows:

- Closing Date : 9 September 2010
- Closing Time : 16:00
- Address : Riverwalk Office Park, Block B, 41 Matroosberg Road, Ashlea Gardens Ext 6, Pretoria
- Telephone : 012 428 8019
- Facsimile : 012 346 4877

- E-mail : [elmarieh@fsb.co.za](mailto:elmarieh@fsb.co.za)

**ADDITIONAL INFORMATION REQUIRED**

- FSB Vendor Accreditation Form
- Valid SARS issued Tax Clearance Certificate
- Original copy of banking details / cancelled cheque