



Addendum – The missing annexes B, C, and D have now been included in the revised version of the RFP and the deadline prolonged to 2024-11-22.

## REQUEST FOR PROPOSAL (RFP)

# DESIGN AND DEVELOPMENT OF SELF-PACED ELEARNING COURSE ON ISO-SPECIFIC STRATEGIC PLANNING TRAINING TO SUPPORT STRATEGIC BUSINESS PLAN (SBP)

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

We believe that our success depends on high-quality standards that meet ongoing, emergent and urgent market needs. We publish more than 1500 International Standards every year and believe that with improved strategic planning capacities, we can achieve a substantial improvement in delivering market-relevant standards, while maintaining the decentralized and consensus-based underpinnings of the ISO system.

To support the better use of strategic planning within ISO committees, we want to ensure that Committee Managers within the ISO system have access to an innovative training package that contextualizes international strategic planning best practices within an ISO context and provides committee leadership teams with value-added tools and competencies to anticipate ongoing, emergent and urgent market needs.

ISO is seeking a supplier to develop an eLearning course that will help its technical committees improve their strategic planning. This course will specifically support the use of a new Strategic Business Plan (SBP) template and accompanying guidance, which are being introduced to modernize the way committees plan and respond to market needs.

Each of ISO's 200+ technical committees is required to maintain a Strategic Business Plan (SBP), to ensure their work aligns with market trends and priorities. Effective strategic planning is crucial for committees to allocate resources efficiently, set clear priorities, and demonstrate the value of standardization in their sectors. A strong SBP helps define the scope, justification, and stakeholders involved in a standardization project, ensuring that the solutions developed meet market demands both in content and urgency.

To further improve committee-level strategic planning as part of the ISO 2030 Strategy, a new policy framework was approved in 2024. This includes the introduction of a new SBP template and guidance, as well as tools like surveys to gather stakeholder feedback. The eLearning course will serve as a key resource for committees, helping them adopt and effectively use this new template and guidance in their strategic planning efforts. ISO is looking for a consultant or supplier to create this training package.

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 **17:00 CET, 2024-11-22** 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](mailto:tenders@iso.org) and copying the ISO Senior Policy Officer at the Standards development and Technical policy unit at [sampson@iso.org](mailto:sampson@iso.org).

Yours sincerely,

Marco Rossi  
Director, Standards development and Technical policy  
ISO Central Secretariat

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## Terms and abbreviations

Abbreviated term	Description
ISO	International Organization for Standardization
ISO/CS	ISO Central Secretariat
LMS	Learning Management System
NSB	National Standards Body
RFP	Request For Proposal
SBP	Strategic Business Plan
SLA	Service Level Agreement
SME	Subject Matter Expert
TMB	Technical Management Board
UAT	User Acceptance Test
VILT	Virtual Instructor-Led Training

# 1 RFP process, terms and conditions

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## 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](mailto:tenders@iso.org) and copying the responsible Senior Policy Officer as indicated below.

Mrs Mikaela Sampson Senior Policy Officer Standards development and Technical policy at ISO Central Secretariat (ISO/CS) E-mail: <a href="mailto:sampson@iso.org">sampson@iso.org</a>
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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	2024-10-18
Clarification calls with Suppliers (upon request)	2024-10-28 to 2024-11-15
Deadline for Suppliers to submit proposal	2024-11-22
Expected evaluation of proposals	Week of 2024-12-02
Virtual interview with short-listed Suppliers and contacting customers referenced in the proposals	Week of 2024-12-09
Validation of the selection	No later than 2024-12-16
Preparing draft contract (including legal review)	Week of 2025-01-10
Award of contract to selected Supplier	Before 2025-01-17

These dates are a guide to the time frame expected for this RFP. Dates may change and the ISO Senior Policy Officer will advise any changes.

Proposals must be submitted in an electronic format by **17:00 CET on 2024-11-22** to [tenders@iso.org](mailto:tenders@iso.org) and copying the Senior Policy Officer at the Standards development and Technical policy unit at [sampson@iso.org](mailto:sampson@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 Project Manager Mikaela Sampson ([sampson@iso.org](mailto:sampson@iso.org)) (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"> <li>▪ Copy of company registration document</li> </ul>
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"> <li>▪ A self-certified letter</li> </ul>
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"> <li>▪ Latest available audited financial statement or a balance sheet <sup>1</sup></li> </ul>
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"> <li>▪ List of international organizations / companies including the contact details of their focal points with the Supplier, and</li> <li>▪ Engagement letters or client's certificates</li> </ul>
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"> <li>▪ Company organizational chart including list of senior managers and number of staff</li> </ul>
<b>Maximum points</b>		<b>100</b>	

**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 70%** with respect to these criteria will be disqualified from this RFP (see clause 5.5).

<sup>1</sup> 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"> <li>Number of years the company has been involved in the design and development of customized eLearning courses and services</li> </ul>	<ul style="list-style-type: none"> <li>Company profile</li> </ul>	20	10%
	<ul style="list-style-type: none"> <li>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</li> </ul>	<ul style="list-style-type: none"> <li>Statistics about delivered/going eLearning development related services</li> </ul>	25	
	<ul style="list-style-type: none"> <li>% 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</li> </ul>	<ul style="list-style-type: none"> <li>Statistics about the company sales and revenues</li> </ul>	20	
	<ul style="list-style-type: none"> <li>Specific technical knowledge and skills that the company has in the area relative to the scope of this RFP</li> </ul>	<ul style="list-style-type: none"> <li>Brief description of company knowledge and areas of expertise</li> </ul>	25	
<ul style="list-style-type: none"> <li>Business continuity plan</li> </ul>	<ul style="list-style-type: none"> <li>Business continuity plan (if available)</li> </ul>	10		
2	Demonstrated capacity to develop and deliver simultaneously eLearning courses with moderate level of interactivity	<ul style="list-style-type: none"> <li>At least three working samples of different eLearning courses/modules</li> </ul>	40	15%
		<ul style="list-style-type: none"> <li>At least three projects sign off documents indicating the start and end dates of the project</li> </ul>	30	
		<ul style="list-style-type: none"> <li>At least three courses' evaluations / assessments from clients and end users</li> </ul>	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	<b>25%</b>
		▪ 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 <sup>2</sup>	100	<b>15%</b>
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	<b>20%</b>
		▪ 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"> <li>▪ Project Manager</li> <li>▪ Instructional Designers</li> <li>▪ eLearning Developers</li> <li>▪ UX/UI Designers</li> <li>▪ Graphic Designers</li> <li>▪ Quality Assurance officer</li> </ul>	▪ Complete set of Curriculum Vitae (CVs) submitted demonstrating the required skills and experience	100	<b>10%</b>
7	Demonstrated professional development and upskilling/reskilling of the Supplier staff through training and certification programs	▪ Training programme of the Supplier staff	70	<b>5%</b>
		▪ Certification programme of the Supplier staff	30	
<b>Total points</b>				<b>100%</b>

<sup>2</sup> 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.)

**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%
<b>Total points</b>				<b>100%</b>

### 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 100, with a weighting of 70% on the professional and technical score and 30% on the financial score.** The three highest scored Suppliers will be short-listed and invited to virtually present their proposals to the evaluation team. The presentation will be assessed independently from the professional, technical and final score on the following criteria:

- Alignment and consistency with the supplier’s proposal and vision (50%)
- Interactivity and engagement of presentation and presenters (30%)
- Visual appeal of presentation (20%)

Unless a serious misalignment or deficiency is identified in the presentation, the supplier with the highest score will be recommended by the ISO internal 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](mailto:tenders@iso.org) and copy the responsible Senior Policy Officer.

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

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### 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 25'000 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 172 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 Business unit owning this RFP**

The ISO Central Secretariat ensures the coordination between the different groups described below.

### **2.3.1 Groups working on strategic planning at ISO**

#### *The Technical Management Board (TMB)*

The management of the technical work at ISO is overseen by the Technical Management Board (TMB), which is part of ISO's governance structure (reporting to the ISO Council). The TMB is also responsible for the oversight of the technical committees that lead standards development and any strategic advisory boards created on technical matters. Additional information on our governance and structure can be found on our website: [www.iso.org/structure](http://www.iso.org/structure).

#### *Strategic Planning Task Force (SPTF)*

Constituted following the approval of the subject project, the Strategic Planning Task Force includes representatives from the TMB, including those who participated in the development of the project, alongside representatives from the ISO technical community with a demonstrated interest in matters related to strategic planning.

#### *Council Standing Committee on Strategic Planning (CSC/SP)*

The CSC/SP coordinates ISO strategy development and its implementation and monitors current trends and emerging issues affecting the development and implementation of international standards.

#### *Project Management*

The project will be overseen by a Project Manager within the Standards Development and Technical policy unit at ISO/CS.



## 3 Project description and requirements

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### 3.1 Setting the context

New technologies, changing customer expectations and the need to develop solutions to address urgent global challenges are putting pressure on ISO to adapt and accelerate its processes. Timeliness is key – ISO must get standards to market quickly, but without compromising the quality of its standards, the rigor of its consensus-based processes or the engagement of the experts from across stakeholder groups that develop standards.

Effectively capturing and incorporating user needs and defining corresponding standardization strategies will be a vital part of this transformation, to understand exactly when the market needs a standard, the content it must contain and the most efficient development approaches and be aligned to a standardization vision.

We believe that our success depends on high quality, market-relevant standards that are delivered on time to users. ISO publishes more than 1500 International Standards every year. These standards are produced in more than 200 technical committees, each of which is required to publish a Strategic Business Plan (SBP) and to update it every three years at minimum. Better and more market-relevant ISO responses require better strategy.

Strategy helps ISO committees to define the business environment, identifying trends and emergent issues. Strategy is needed to effectively allocate limited resources and set priorities. Strategy demonstrates the value-added benefits of standardization within the wider market / development context. Finally, strategy provides a roadmap for active and interested stakeholders to participate effectively in standardization work.

#### 3.1.1 ISO Strategic Business Plans

The definition of any standardization project must fit within the context of the wider market, including its scope, justification, stakeholders and relationship with other standardization activity. At its core is how international standards and alternative deliverables respond effectively to market needs – both in terms of content and time / urgency to deliver the content. The clear definition of problems within the market sector and the means by which different international standardization solutions can add value in addressing defined problems is central to the effective definition of strategy. At the Committee level, this definition is best undertaken within the framework of a well-crafted Strategic Business Plan (SBP).

Presently, the use of SBPs is sub-optimal. The current policy framework ([Annex SC, ISO/IEC Directives, Part 1](#)) for SBPs has been in place since 1998, with mixed results. Almost half of SBPs are more than five years out-of-date, the quality and analytical value-added of the reviewed documents is mixed with a majority providing limited strategic insights into the Committee's field of activity, thus limiting the effective use of the SBPs as a priority-setting tool and as a strategic roadmap for standardization activity. There is a strong minority view within the technical community that SBPs represent an administrative burden, with 25% of respondents in a December 2020 survey agreeing with this statement. On the other hand, there are examples of excellent SBPs among a minority of ISO Committees. These documents are actively used by Committee leadership teams to vet new projects and establish priorities and accountabilities.

The present guidance for SBPs is captured in template associated with the current set of requirements in Annex SC. No further guidance or training is currently provided under the existing policy.

Recognizing the importance of committee-level strategic thinking as part of the wider ISO 2030 Strategy, the Technical Management Board approved the Committee Strategy Management project



in 2022 and the establishment of a Strategic Planning Task Force (SPTF) to advise on the project's implementation and to review and pilot the use of its deliverables. The task force proceeded to define the value proposition for the evolution of formal strategic planning in ISO, which is a key foundation in supporting the ISO 2030 Strategy vision of making lives easier, safer and better. This modernized SBP approach is expected to provide value to ISO committees by:

- Identifying benefits and vision of standardization within the committee's field of activity
- Linking benefits to higher strategic imperatives (ISO 2030 Strategy, SDGs, London Declaration Action Plan)
- Prioritizing among projects and allocating resources
- Providing transparency and communicating through a format adapted to three key audiences (general public, TMB and other TCs, and internal TC stakeholders)
- Encouraging data-driven continuous improvement, including user perspectives where available
- Providing flexibility for different market cadences

On the basis of the above value proposition, the TMB approved an overarching policy framework for the modernization of ISO's strategic planning framework for technical committees in early 2024, which will include the piloting of a new template and guidance for SBPs beginning in mid-2024. The policy framework also calls for the publication of complimentary guidance and e-learning to support the new framework and template, as well as the incorporation of new tools, such as surveys and other feedback tools.

### 3.1.2 Strategic Planning Training

A December 2020 survey of the ISO technical community suggested that well over half of Committees would see utility in an **ISO-specific strategic planning training** as a means to improve SBPs. As such, the Committee Strategy Management project envisions **the identification of a Consultant/Supplier to develop an ISO-specific strategic planning training e-learning package that will complement the new template and guidance**. This demonstrated need was reinforced in an October 2023 survey, where **85% of responding Committee leaders saw the provision of an online ISO-specific strategic planning e-learning programme as important, with 50% seeing it as very important**.

## 3.2 The situation today

Among its seven strategic priorities, the ISO 2030 Strategy prioritizes **delivering ISO standards when the market needs them** and **strengthening ISO members through capacity building**. A strategic project **Committee Strategy Management** was approved in 2022, with the overall goal of providing a safe, efficient and supporting environment supporting an enhanced value proposition of Committee-level SBPs. Building on the feedback received from the technical community, project objectives are threefold, encompassing the improvement of Committee-level competencies, improved SBPs and better strategic oversight by TMB.

Taken together, these activities are designed to strengthen the role played by SBPs in prioritizing and managing technical activity at the Committee level. The project is expected to sustain the results of previous ISO investments in project management and to further increase market responsiveness of ISO deliverables, by improving strategic management capacities within ISO Committees, and providing the technical community with an enhanced set of ISO-mediated tools, including an **ISO-specific strategic planning e-learning to foster strategic excellence**.

The e-learning would be housed on ISO's existing digital learning platform and is expected to be mandatory for Chairs, working group conveners and Committee Managers. Refer to the publication **my ISO job** for further details on these roles.

The initial framework for modernized ISO strategic business plans would include the following core elements for any given committee scope:

- Business environment and future trends
- Benefits of standards and vision for standardization in the committee's field of activity
- Sustainability and alignment with UN Sustainable Development Goals
- Reflections on climate change and net-zero emissions
- Reflections on current publications and their market impacts
- Reflections on stakeholder mixture and engagement
- Developing country perspectives
- Conformity assessment

While the Supplier would undertake further pedagogical analysis, an initial outline of the envisioned training package would include:

- The value-added of strategic planning in a standardization environment
- Foresight activities, assessing future technologies, future economic trends, etc.,
- Effective environmental scanning
- Aligning scope-specific objectives with higher-level strategic imperatives as represented in the ISO 2030 Strategy
- Setting of clear, specific and measurable strategic objectives and the construction of an effective standardization roadmap;
- Setting priorities amongst projects
- Best practices in using SBPs to support Committee operation

### **3.2.1 Expected Benefits**

It is expected that the Committee Strategy Management project will:

- Foster a culture and system shift within the ISO system to better integrate strategic planning into Committee and TMB deliberations;
- Increase strategic planning capacities and insights among ISO Committees, supporting more systematic review of priorities, market needs, deliverables, accountabilities and publication target dates;
- Foster more active and engaged internal Committee management through the provision of new ISO/CS tools and supports for strategic and operational planning, accountability and meeting market needs.

From a strategic planning training perspective, the main expected benefits is a stronger appreciation and capacity among Committee leadership teams to undertake and lead strategic planning exercises and draft high-quality and insightful SBPs

### **3.2.2 Critical Success Factors**

Critical success factors underpinning the success of this Committee Strategy Management project include:

- Strong engagement among leading Committees to share best practices and contribute to the project's implementation;
- Engaged Committee leadership teams, especially among those NSBs holding Committee secretariats;
- Willingness of Committee managers to further develop their competencies in ISO-specific strategic thinking;
- Analytical capacities within the project team and wider technical community to provide value-added strategic insight to the TMB.

From a training perspective, the critical success factors include:

- Value-added insights on strategic planning that increase Committee leaders' appreciation of the strategic planning process and its benefits in standardization work
- Clear linkages between e-learning material and the modernized strategic planning framework approved by the TMB
- Adaptability to feedback from ISO/CS, SPTF and an agile approach to training material development, allowing for adaptations and continuous improvement

### **3.3 Purpose of the RFP**

The scope of services is the development of an ISO-specific strategic e-learning package designed to increase the capacities of technical committees, especially their leadership teams as outlined in my ISO job, to implement the TMB's modernized vision for strategic planning, such as foresight, strategic alignment and high-level stakeholder engagement in support of the above noted critical success factors.

The e-learning package should not take more than 90 minutes to complete and must offer a level of interactivity and insight that is comparable with ISO's existing e-learning package.

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:

- Understand the importance of strategic planning in ISO committees, particularly within the context of the 2030 ISO Strategy
- Understand the new ISO strategic planning framework and its implications for ISO committees
- Be able to appreciate linkages between standardization and wider economic, political, regulatory and social trends
- Be able to translate macro-level market trends into standardization priorities
- Be able to view strategic plans from the perspective of a market stakeholder outside of the standardization community
- Be able to consider the intersection between strategic imperatives and the ISO deliverables package and select the most appropriate deliverable

### **3.5 Target audience**

The Committee Manager and Chair roles as outlined have been identified as having the most responsibility for overseeing and coordinating the development of SBPs. These roles are central in managing the committee's projects and therefore requires a substantial level of project management knowledge and skill, supported by strong strategic / technical underpinnings in their fields of activity. We currently have approximately 800 Committee Managers from approximately 40 countries around the world.

SBPs benefit from the input of wider committee membership, especially working group Conveners and Project Leaders. In some committees, this broadened leadership group is convened through a Chairs Advisory Group or similar structure and plays a key role in drafting and reviewing the SBP. Other CAGs assess new work item proposals through the lens of their SBP.

It is expected that the content of the training material could also benefit, as general background information, to around 3500 experts having a role of working group Convenor and/or Project Leaders

who are the key resources when developing projects and report to the Committee Managers about the progress on their standards projects.

### **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.
- 12) Reviewing the specific context of strategic planning within the ISO context, including the analysis of SBPs undertaken by ISO/CS in 2020, and the results of 2020 and 2023 surveys;
- 13) Reviewing selected SBPs per SPTF and ISO/CS guidance alongside current rules pertaining to the development and approval of SBPs per ISO/IEC Directives, Part 1;
- 14) Reviewing emergent strategic planning framework, guidance and new SBP templates

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 90 minutes.

The estimated time (90 minutes) 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
<b>Project proposal and plan</b>	A document which contains the instructional design approach for the course development activities and detailed timeline (see clause 3.6.1)	No later than 22 November 2024
<b>Project contract</b>	The final project contract is signed by the Supplier and ISO	Before mid-January 2025
<b>Instructional Design Document (IDD)</b>	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"> <li>▪ What is the purpose of the course?</li> <li>▪ Who is the audience?</li> <li>▪ What are learners expected to know/do at the end of the course?</li> <li>▪ How will learners access and navigate the course?</li> <li>▪ What instructional strategy will be adopted?</li> </ul>	February 2024

Deliverable type	Description	Timeline
	<ul style="list-style-type: none"> <li>▪ What is the proposed learning experience design for this course?</li> <li>▪ What are the interactive elements used?</li> <li>▪ How will learners be assessed?</li> </ul>	
<b>Content outlines and Storyboards</b>	Content outlines, storyboards and prototypes are developed for ISO review are signed off prior to the start of the development stage	February 2024
<b>Alpha and Beta versions of the modules outputs</b>	The modules outputs are shared with ISO for review are signed off prior to the start of testing stage	February – March 2025
<b>User Acceptance Testing (UAT) results</b>	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
<b>Final project deliverables package</b>	<p>This package includes:</p> <ul style="list-style-type: none"> <li>▪ A SCORM package that contains all the modules files to upload them into the ISO Digital Learning Platform.</li> <li>▪ Visual assets include but are not limited to fonts, icons, graphics, images, and animations.</li> <li>▪ Audio assets include but are not limited to voice recordings, music, and sound effects.</li> </ul>	May 2025
<b>Project sign-off document</b>	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 3.6.3)
- 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 **seventy-five thousand Swiss franc (CHF 75'000)**. 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**

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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

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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 3.6.3).

#### **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.

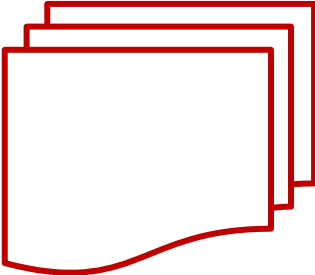
### **5.8 Additional relevant information**

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.





# DESIGN AND DEVELOPMENT OF SELF-PACED ELEARNING COURSE ON ISO-SPECIFIC STRATEGIC PLANNING TRAINING TO SUPPORT STRATEGIC BUSINESS PLAN (SBP)

## ANNEX B – BID DECLARATION FORM

(REFERENCE NUMBER: ISO/SDTP/2024/10)

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**We, the undersigned, declare that:**

- a) We understand and agree to be bound to all conditions and terms stated in this RFP;
- b) We have examined and have no reservations to the RFP requirements;
- c) We offer to provide the services in conformity with the RFP requirements;
- d) Our bid shall be valid for a period of six (6) months from the date fixed for the bid submission deadline in accordance with the RFP requirements, and it shall remain binding upon us and may be accepted at any time before the expiration of that period;
- e) We confirm that we are financially qualified and compliant to bid for this project in accordance with the minimum requirements for qualification of bidders for this project;
- f) We understand that ISO is not bound to accept the lowest bid or any other bid that it may receive; and
- g) We respect and ensure that our employees and any other person likely to act on our behalf respect the absolute confidentiality and intellectual property of all the ISO data and training materials that we have obtained or received as a result of our participation in this RFP.

Bidder name:	Bidder signature:
Job title:	Date:



## DESIGN AND DEVELOPMENT OF SELF-PACED ELEARNING COURSE ON ISO-SPECIFIC STRATEGIC PLANNING TRAINING TO SUPPORT STRATEGIC BUSINESS PLAN (SBP)

### ANNEX C – COMPLIANCE SHEET FOR PRE-QUALIFICATION CRITERIA

(REFERENCE NUMBER: ISO/SDTP/2024/10)

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Bidder name:	Bidder signature:
Job title:	Date:

***Only bidders who get an overall score of 100 will pass the pre-qualification criteria described below and would be considered as qualified to move to the next stage of RPF evaluation.***

## Category: Pre-qualification criteria

#	Criteria	Fail/Pass (0/20)	Required documents	Can the Bidder provide? Indicate Yes or No	Provide a qualifying response with supporting details as needed
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"> <li>▪ Copy of company registration document</li> </ul>		
2	The company has not been blacklisted by any international organizations over the past five years	Fail/Pass (0/20)	<ul style="list-style-type: none"> <li>▪ A self-certified letter</li> </ul>		
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"> <li>▪ Latest available audited financial statement or a balance sheet <sup>1</sup></li> </ul>		

<sup>1</sup> 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.



4	<p>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</p>	<p>Fail/Pass (0/20)</p>	<ul style="list-style-type: none"> <li>▪ List of international organizations / companies including the contact details of their focal points with the Supplier, and</li> <li>▪ Engagement letters or client's certificates</li> </ul>		
5	<p>The company has an active workforce of at least 10-15 personnel, with skills relevant to the service requirements of the RFP</p>	<p>Fail/Pass (0/20)</p>	<ul style="list-style-type: none"> <li>▪ Company organizational chart including list of senior managers &amp; number of staff</li> </ul>		



## DESIGN AND DEVELOPMENT OF SELF-PACED ELEARNING COURSE ON ISO-SPECIFIC STRATEGIC PLANNING TRAINING TO SUPPORT STRATEGIC BUSINESS PLAN (SBP)

### ANNEX D – COMPLIANCE SHEET FOR PROFESSIONAL AND TECHNICAL CAPACITIES CRITERIA

(REFERENCE NUMBER: ISO/SDTP/2024/10)

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Bidder name:	Bidder signature:
Job title:	Date:

***Bidders who receive an overall score below 80 with respect to the professional and technical capacities criteria described below will be disqualified from this RFP.***

#	Criteria	Required documents	Maximum score (100)	Relative weight %	Can the Bidder provide? Indicate Yes or No	Provide a qualifying response with supporting details as needed in the proposal
1.	<b>Company profile and geographical coverage, including the following:</b>					
	<ul style="list-style-type: none"> <li>Number of years the company has been involved in the design and development of customized eLearning courses and services</li> </ul>	<ul style="list-style-type: none"> <li>Company profile</li> </ul>	20	10%		
	<ul style="list-style-type: none"> <li>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</li> </ul>	<ul style="list-style-type: none"> <li>Statistics about delivered/going eLearning development related services</li> </ul>	25			
	<ul style="list-style-type: none"> <li>% 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</li> </ul>	<ul style="list-style-type: none"> <li>Statistics about the company sales and revenues</li> </ul>	20			
	<ul style="list-style-type: none"> <li>Specific technical knowledge and skills that the company has in the area relative to the scope of this RFP</li> </ul>	<ul style="list-style-type: none"> <li>Brief description of company knowledge and areas of expertise</li> </ul>	25			

#	Criteria	Required documents	Maximum score (100)	Relative weight %	Can the Bidder provide? Indicate Yes or No	Provide a qualifying response with supporting details as needed in the proposal
	<ul style="list-style-type: none"> <li>Business continuity plan</li> </ul>	<ul style="list-style-type: none"> <li>Business continuity plan (if available)</li> </ul>	10			
2	Demonstrated capacity to develop and deliver simultaneously eLearning courses with moderate level of interactivity	<ul style="list-style-type: none"> <li>At least three samples of different eLearning courses/modules</li> </ul>	40	15%		
		<ul style="list-style-type: none"> <li>At least three projects sign off documents indicating the start and end dates of the project</li> </ul>	30			
		<ul style="list-style-type: none"> <li>At least three courses' evaluations/assessments from clients and end users</li> </ul>	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	<ul style="list-style-type: none"> <li>Documented service delivery methodology</li> </ul>	60	25%		
		<ul style="list-style-type: none"> <li>Project management approach</li> </ul>	40			

#	Criteria	Required documents	Maximum score (100)	Relative weight %	Can the Bidder provide? Indicate Yes or No	Provide a qualifying response with supporting details as needed in the proposal
4	Demonstrated capacity to actual service delivery of an eLearning content using the ISO training materials provided in Annex A	<ul style="list-style-type: none"> <li>2 to 3 minutes e-learning prototype developed based on the requirements provided by ISO in the RFP<sup>1</sup></li> </ul>	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)	<ul style="list-style-type: none"> <li>At least three examples of complete instructional design documents (IDD)</li> </ul>	50	20%		
		<ul style="list-style-type: none"> <li>Access at least to three customized eLearning courses delivered to clients</li> </ul>	50			

<sup>1</sup> The prototype should include (at least) a module outline, storyboard, assessment plan ... etc.

#	Criteria	Required documents	Maximum score (100)	Relative weight %	Can the Bidder provide? Indicate Yes or No	Provide a qualifying response with supporting details as needed in the proposal
6	<p>2. Having a sufficient number of qualified eLearning professionals to be assigned to the ISO project, namely:</p> <ul style="list-style-type: none"> <li>▪ Project Manager</li> <li>▪ Instructional Designers</li> <li>▪ eLearning Developers</li> <li>▪ UX/UI Designers</li> <li>▪ Graphic Designers</li> <li>▪ Quality Assurance officer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Complete set of Curriculum Vitae (CVs) submitted demonstrating the required skills and experience</li> </ul>	100	10%		
7	Demonstrated professional development and upskilling/reskilling of the Supplier staff through training and certification programs	<ul style="list-style-type: none"> <li>▪ Training programme of the Supplier staff</li> </ul>	70	5%		
		<ul style="list-style-type: none"> <li>▪ Certification programme of the Supplier staff</li> </ul>	30			
<b>Maximum points</b>			<b>700</b>	<b>100%</b>		



## REQUEST FOR PROPOSAL (RFP) - Design and development of self-paced elearning course on ISO-specific strategic planning training to support strategic business plan (SBP) - Addendum

### Questions received from interested suppliers and answers to them

1. The target audience for the eLearning includes ISO Technical Committee (TC) Managers and Chairs, as well as Working Group Convenors, Project Leaders, and Chairs Advisory Group members. (RFP Ref 3.5).

**Questions:**

- Could you please confirm if all the eLearning content will be equally applicable to all members of the target audience or whether some will need to be role based?
- If certain aspects of the eLearning need to be role based, could you please provide additional clarity on the differences in focus and applicability to help us better design and scope the solution and project?

**Answers:** Equally applicable.

2. We understand that the ISO training material provided in Annex A (ISO's publication on "**Guidance for new work**" (PUB100438.pdf)) is to be used for developing the eLearning, together with updates and additional resources to be provided by the two ISO Subject Matter Experts (SMEs). (RFP Ref 3.6.1)

**Questions:**

- Could you please confirm that the "Guidance for new work" publication shared is to be considered as the source content on the basis of which the SPB eLearning will be created?
- To what extent does it represent the complete and final source content – what amount and type of updates and additional content are expected to be received from the SMEs?
- Are there any sections or topics that are of especially key relevance to SBP for TCs, or is all the content of the pdf considered as primary content?

**Answers:** We are currently piloting a new SBP template (which is not public yet) and guidance among a few pilot committees. This document will be shared with the chosen supplier to help develop the course material. The new SBP template will be published in May 2025, when a new version of the ISO/IEC Directives is published. The guidance is currently being developed and refined and will be shared with the chosen supplier upon completion in early 2025.

The guidance on new work is a source document for the RFP.

3. There are six objectives listed as desired outcomes for learners from the eLearning course. (RFP Ref 3.4)

**Questions:**

- Could you please share any additional specific performance-related objectives that the eLearning should help learners to do (tasks, actions, etc)?
- Could you please share any particular measures or indicators against which the performance of these tasks/actions would be assessed that could help inform the design of the eLearning?
- Will the eLearning be part of a larger training or performance support initiative – for example, do you plan to follow it with any classroom or virtual ILT sessions? If yes, could you please share more details about the aims and contents of these sessions?

**Answers:** The objective is to help learners develop a good SBP. Worth mentioning is that a separate elearning will be developed on the ISO/IEC Directives. This will focus on standards development whereas this elearning is concentrating on developing a good SBP.

**4.** The ISO Technical Management Board (TMB) has approved a modernized strategic planning framework for ISO TCs which includes a new template and associated guidance for SBPs. (RFP Ref 3.1.1 and 3.1.2)

**Questions:**

- Could you please confirm if the new template and associated guidance for SBPs have already been piloted and released for use?
- Will the eLearning need to cover the contents of the new template and guidance? If yes:
- To what extent/depth, to achieve what type of objectives?
- Could you please share the new template and guidance so that we can get an idea of its contents and how they relate to topics listed in the initial outline of the envisioned eLearning package in RFP Section 3.2?

**Answer:** The SBP template and guidance are currently being piloted among ISO technical committees (45) and will be shared with the chosen supplier in early 2024.

The (Pilot) SBP is divided into the following sections:

- Business environment and future trends
- Benefits of standards and vision for standardization in the field of activity
- Climate change, net-zero and sustainability
- Market impacts
- Stakeholder mixture and engagement
- Developing country perspectives
- Coordination and cohesion
- Conformity assessment

**5.** The use of SBPs is sub-optimal; many are out-of-date, and there is a perception that they represent an administrative burden. There are also examples of excellent SBPs among a minority of ISO Committees. (RFP Ref 3.1.1)

**Questions:**

- If available, could you please share more specific feedback that could help to inform the eLearning design – for example about:
- Why were SBPs not developed and/or updated?
- What hurdles or challenges did TCs face?
- Why were they not (felt to be) beneficial?
- What type of supporting guidance/information/examples would have been useful but were missing?
- From the TC Business plans for public review, could you please identify one or two which we could refer to as examples of excellent ones?

**Answers:** Many committees feel that the SBPs are an administrative burden (25% of respondents in a December 2020 survey agreeing with this statement).



The SBP was often developed by the Committee Manager, with little engagement from the committee. The former template dates from 1998 and feels outdated.

**6.** The eLearning can be broken into multiple smaller shorter modules. (RFP Ref 3.6.1)

**Question:**

- Could you please confirm that if this approach is implemented, each of the smaller eLearning modules will be a self-contained independent package (SCORM 1.2 SCO on the LMS) with its own scored assessment?

**Answer:** Each module would have to work independently.

**7.** The eLearning must offer a level of interactivity and insight that is comparable with ISO's existing e-learning package. (RFP Ref 3.3)

**Question:**

- Could you please clarify which existing ISO eLearning package is being referred to here, and share some references from it to help us understand the type and level of interactivity and insight that is benchmarked?

**Answers:** The same look and feel with the other ISO elearning courses available here: [Home | ISO Digital Learning Platform](#)

**8.** The eLearning needs to be designed considering Level AA of the Web Content Accessibility Guidelines 2.1. (RFP Ref 3.6.1)

**Questions:**

- Could you please let us know if there are any specific accessibility features that are “non-negotiable” (for example alt text for static visuals, keyboard navigation, etc), so that we can take these into account while also keeping in mind Articulate Storyline and/or Rise accessibility features and capabilities?
- Would you like to have 2 separate versions – one with accessibility features and a standard one which may be more interactive and media-rich? These 2 versions would be part of a single package where the learner would be presented with an option to select the required version upon launch of the eLearning. Or are you necessarily looking for a single version with accessibility features integrated?
- If 2 separate versions are fine, should they both be made in the same authoring tool (Storyline/Rise) or would be OK with a HTML output for the accessible version. (we can show/share samples of how this would work if required)

**Answer:** In general, level AA of the Web Content Accessibility Guidelines 2.1 should be considered at an early stage of the project design. However, in some cases the design of the project may limit the implementation of some accessibility criteria, and then the two parties (i.e. the supplier and the ISO) should agree on how to resolve these issues. The preferred option is a single version with built-in accessibility features.

**9.** For these in-scope services (RFP Ref 3.6.1):

- 12) Reviewing the specific context of strategic planning within the ISO context, including the analysis of SBPs undertaken by ISO/CS in 2020, and the results of 2020 and 2023 surveys;
- 13) Reviewing selected SBPs per SPTF and ISO/CS guidance alongside current rules pertaining to the development and approval of SBPs per ISO/IEC Directives, Part 1;
- 14) Reviewing emergent strategic planning framework, guidance and new SBP templates

**Question:**

- Could you please provide additional clarity on the tasks that we would need to undertake here, and how they would impact the source content to be used for the development of the eLearning?

**Answer:** To review the ISO Strategy 2030, the pilot SBP template and guidance once it's finalized in early 2025 , and the survey results.

**10.** The eLearning needs to be developed using Articulate 360, in either Storyline or Rise 360. (RFP Ref 3.6.1). 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 also need to be provided. (RFP Ref 5.4)

**Question:**

- The design approach and therefore the associated costs and timelines would differ based on the tool, are we expected to provide two solutions – one for Storyline development and one for Rise development, with two corresponding sets of approaches, costs, and timelines, as well as two prototypes? Please clarify.

**Answer:** We support both tools, but you are welcome to submit a proposal using just one solution.

**11. Question:**

- What is ISO's Learning Management System (LMS) and are there any specific SCORM requirements?

**Answer:** ISO uses Moodle and the ISO elearning platform can be found here: [Home | ISO Digital Learning Platform](#).

**12. Question:**

- Are there any specific browser/device compatibility requirements?

**Answer:** Depending on the type of authoring tool (i.e. Storyline versus Rise 360), the following internet browsers are recommended:

- For Desktop Devices: Latest versions of Google Chrome, Firefox and Microsoft Edge (for both Storyline and Rise 360)
- For Mobile Devices: Safari in Apple iOS/iPadOS (latest version), Google Chrome (latest version) in Apple iOS/iPadOS (latest version) and Google Chrome (latest version) in Android OS 6 or later (for Rise 360)

**13. Question:**

- Is gamification a desired feature for this eLearning course beyond scenario-based learning?

**Answer:** It is not but we are open to offers to include this.

**14. Question:**

- What is ISO's policy on the use of AI in course delivery?

**Answer:** ISO does not yet have a policy on the use of AI in course delivery (yet).

**15. Question:**

- Table 1.9.1 mentions a "self-certified letter". We are assuming this is an affidavit. Does ISO have a template for this? And must this be certified by a commissioner of oath?

**Answer:** We do not have a template for this. An affidavit is legally binding whereas a self-certified letter is a personal declaration without legal formalities. A self-certified letter is a statement or declaration made and signed by an individual. It does not require an oath, notarization, or an authorized official's involvement.

**16. Question:**

- We would like to kindly recommend that intellectual property protections be granted to bidders for any prototypes submitted, particularly to safeguard their design conceptualization. Additionally, would you consider the possibility of either removing the prototype requirement from the RFP or creating a separate phase specifically for selected bidders to develop a prototype?

**Answer:** We appreciate the importance of safeguarding proprietary design concepts and understand the value placed on intellectual property. However, given that we anticipate receiving similar proposals from multiple suppliers, it may not be feasible to extend specific IP protections for each prototype at this stage. Note that the prototype should be just a few minutes long and counts for 15% of the total score.