PROCUREMENT OF LEARNING MANAGEMENT SYSTEM (LMS)

YTC – LMS-2026-01

Appendices

YEOVIL TOWN COUNCIL

Tender Reference: YTC-LMS-2026-01

Appendix A – Requirements Response Matrix

Tenderers must complete this matrix and provide supporting evidence for each requirement.

Ref	Requirement	Classification	Compliant (Y/N/Partial)	Comments / Evidence
FR1	Cloud-hosted SaaS solution	Mandatory		
FR2	Access via standard web browser	Mandatory		
FR3	Mobile and tablet compatibility	Mandatory		
FR4	User authentication and role based permissions	Mandatory		
FR5	Automated enrolment and completion reminders	Mandatory		
FR6	Training certificate generation	Mandatory		
FR7	Compliance dashboard	Mandatory		
FR8	Manager reporting functionality	Mandatory		
FR9	Audit trail of learner activity	Mandatory		
FR10	Course library included	Mandatory		
FR11	Upload of Council produced content	Mandatory		
FR12	Ability to amend existing content	Mandatory		
FR13	SCORM-compliant content support	Desirable		
FR14	Video learning support	Mandatory		
FR15	Knowledge sharing repository	Mandatory		
FR16	WCAG 2.2 AA compliance	Mandatory		
FR17	Multi-level reporting	Mandatory		
FR18	Bulk user upload capability	Mandatory		
FR19	Annual training scheduling	Mandatory		
FR20	Microsoft Entra ID Single Sign-On	Mandatory		
FR21	Outlook integration	Mandatory		
FR22	Microsoft Teams integration	Mandatory		
FR23	UK GDPR compliance	Mandatory		
FR24	99.9% monthly availability	Mandatory		
FR25	AI disclosure and governance controls	Mandatory		

Appendix B – Pricing Schedule

Implementation Costs

Item	Cost (£ excl. VAT)
Project Initiation and Planning	
System Configuration	
User Setup and Import	
Data Migration	
Administrator Training	
Testing and Acceptance Support	
Go-Live Support	
Project Management	
Other (Specify)	
Total Implementation Cost	

Annual Recurring Costs

Item	Year 1 (£ excl. VAT)	Year 2 (£ excl. VAT)	Year 3 (£ excl. VAT)
LMS Subscription			
Content Library			
Support and Maintenance			
Account Management			
Other Recurring Charges			
Annual Total			

Extension Period Pricing

Item	Extension Year 4 (£ excl. VAT)	Extension Year 5 (£ excl. VAT)	Extension Year 6 (£ excl. VAT)	Extension Year 7 (£ excl. VAT)
LMS Subscription				
Content Library				
Support and Maintenance				
Account Management				
Other Recurring Charges				
Annual Total				

Optional Services

Item	Cost (£ excl. VAT)
Additional Users	
Consultancy Services	
Additional Training	
Other Optional Services	

Appendix C – Demonstration Script

Supplier Demonstration Requirements

Shortlisted suppliers will be required to provide a demonstration lasting approximately 60 minutes.

Demonstration Areas

1. User Experience

Demonstrate:

- User login process
- Dashboard experience
- Mobile experience
- Accessibility features

2. Course Management

Demonstrate:

- Assigning training
- Mandatory learning pathways
- Automated reminders
- Completion tracking

3. Reporting and Compliance

Demonstrate:

- Compliance dashboards
- Manager reports
- Training matrices
- Export functionality

4. Content Management

Demonstrate:

- Creation of a course
- Uploading documents
- Uploading video content
- Creating assessments

5. Microsoft 365 Integration

Demonstrate:

- Single Sign-On
- User synchronisation
- Teams integration
- Outlook notifications

6. Administration

Demonstrate:

- User creation
- Role management
- Reporting configuration
- Permission controls

7. Support and Service Management

Demonstrate:

- Support arrangements
- Monitoring tools
- Administration portal

Appendix D – Conflict of Interest Declaration

Declaration

I confirm that:

☐ No actual, potential or perceived conflicts of interest exist in relation to this procurement.

OR

☐ The following actual, potential or perceived conflicts exist:

I understand that failure to disclose a relevant conflict may result in exclusion from the procurement process.

Authorised Signatory

Name:

Position:

Organisation:

Signature:

Date:

Appendix E – Supplier Declaration

Organisation Details

Organisation Name:

Company Registration Number:

VAT Registration Number:

Registered Address:

Declarations

The Supplier confirms that:

Legal Status

☐ The organisation is legally entitled to enter into this contract.

Financial Standing

☐ The organisation is financially viable and capable of delivering the contract.

Insurance

☐ Appropriate insurance cover is maintained.

Modern Slavery

☐ The organisation complies with the Modern Slavery Act 2015.

Anti-Bribery

☐ The organisation complies with the Bribery Act 2010.

Data Protection

☐ The organisation complies with UK GDPR requirements.

Accuracy of Information

☐ All information supplied in this tender response is accurate and complete.

Authorised Declaration

I certify that the information provided is accurate and that I am authorised to sign this declaration on behalf of the organisation.

Name:

Position:

Organisation:

Signature:

Date:

Appendix F – Reference Template

Each tenderer shall provide a minimum of three client references relevant to the proposed solution.

At least one reference must be from a UK local authority, town council, parish council or other public sector organisation.

References should relate to contracts that are current or have been completed within the last five years and should demonstrate experience of implementing and supporting a Learning Management System of comparable scope and complexity.

The Council reserves the right to contact any reference provided and to seek clarification regarding the supplier's performance, service quality, implementation approach and ongoing support arrangements.

Reference 1

Organisation	
Contact Name	
Position	
Email Address	
Telephone	
Contract Start Date	
Number of Users	
Brief Project Description	

Reference 2

Organisation	
Contact Name	
Position	
Email Address	
Telephone	
Contract Start Date	
Number of Users	
Brief Project Description	

Reference 3

Organisation	
Contact Name	
Position	
Email Address	
Telephone	
Contract Start Date	
Number of Users	
Brief Project Description	

Appendix G – Data Processing, Security and AI Governance Questionnaire

Tenderers shall complete all questions and provide supporting evidence where applicable.

Section 1 – Data Protection and Data Processing

Ref	Question	Supplier Response
DP1	Provide details of your Data Protection Officer or primary data protection contact.	
DP2	Confirm compliance with UK GDPR and the Data Protection Act 2018.	
DP3	Describe the categories of personal data processed by the proposed solution.	
DP4	Identify all locations where Council data will be stored and processed.	
DP5	Confirm whether any data will be processed outside the UK and provide details of safeguards.	
DP6	Identify all sub-processors with access to Council data.	
DP7	Describe the process for appointing or changing sub-processors.	
DP8	Describe data retention and secure deletion arrangements.	
DP9	Confirm that all Council data remains the property of Yeovil Town Council.	
DP10	Confirm that Council data, learner records and content can be exported at any time during the contract without additional licence fees.	
DP11	Describe data return and deletion processes at contract termination.	

Section 2 – Hosting and Infrastructure

Ref	Question	Supplier Response
H1	Identify the hosting provider(s) used to deliver the service.	
H2	Identify the primary hosting location(s) and data centres utilised.	
H3	Describe the platform architecture and resilience arrangements.	

H4	Describe data backup arrangements, including frequency and retention periods.	
H5	Describe business continuity and disaster recovery arrangements.	
H6	State the Recovery Time Objective (RTO).	
H7	State the Recovery Point Objective (RPO).	
H8	Confirm the guaranteed monthly service availability percentage.	

Section 3 – Information Security

Ref	Question	Supplier Response
IS1	Describe your information security management arrangements.	
IS2	List all current security certifications held (including Cyber Essentials, Cyber Essentials Plus, ISO 27001 or equivalent). Please provide certificate numbers, expiry dates and attach copies of current certificates with your tender submission.	
IS3	Describe user authentication and access control arrangements.	
IS4	Confirm support for Microsoft Entra ID Single Sign-On.	
IS5	Describe monitoring, logging and threat detection arrangements.	
IS6	Describe vulnerability management and patch management processes.	
IS7	Describe penetration testing arrangements and frequency.	
IS8	Describe encryption standards used for data in transit and at rest.	

Section 4 – Incident Management and Cyber Security

Ref	Question	Supplier Response
IM1	Describe your security incident management procedures.	
IM2	Confirm whether any reportable personal data breaches have occurred within the past three years.	
IM3	Describe corrective actions taken following any incidents reported in IM2.	
IM4	Describe your breach notification arrangements.	

IM5	Confirm that the Council will be notified within 24 hours of becoming aware of a breach affecting Council data.	

Section 5 – Artificial Intelligence and Automated Processing

Ref	Question	Supplier Response
AI1	Does the proposed solution contain any AI-enabled functionality? If yes, provide details.	
AI2	Identify all AI providers, services and models utilised.	
AI3	Confirm whether Council data, learner data, uploaded documents or user interactions are used to train AI models.	
AI4	Specify the geographic locations where AI processing occurs.	
AI5	Confirm whether Council data is retained by any AI provider and provide retention periods.	
AI6	Confirm whether AI functionality can be disabled by the Council.	
AI7	Describe human oversight and governance controls applied to AI-generated outputs.	
AI8	Describe how AI-generated content or recommendations are identified to users.	
AI9	Describe measures in place to prevent inaccurate, biased or inappropriate outputs.	
AI10	Confirm whether customer data is used for product improvement, model improvement or service development.	
AI11	Describe how AI functionality complies with UK GDPR requirements.	

Section 6 – Additional Information

Ref	Question	Supplier Response
A1	Provide any additional information relevant to data protection, cyber security, hosting, resilience or AI governance.	