PROCUREMENT OF LEARNING MANAGEMENT SYSTEM (LMS)

YTC – LMS-2026-01

Invitation to Tender (ITT)

YEOVIL TOWN COUNCIL

Tender Specification

Contracting Authority: Yeovil Town Council
Town House
19 Union Street
Yeovil
Somerset
BA20 1PQ
Website: www.yeovil.gov.uk
Procurement contact: procurement@yeovil.gov.uk

Procurement Reference: YTC-LMS-2026-01
Issue Date: 9 November 2026

1. Procurement Information

1.1. Procurement Timetable

Activity	Date
Issue of Invitation to Tender	9 November 2026
Clarification Deadline	27 November 2026, 12:00 noon
Tender Submission Deadline	8 December 2026, 12:00 noon
Compliance Review and Shortlisting	9 December 2026 - 11 December 2026
Supplier Demonstration Invitations Issued	By 11 December 2026
Supplier Demonstrations	11 January 2027 - 15 January 2027
Evaluation Moderation and Final Scoring	18 January 2027 - 20 January 2027
Notification of Outcome	22 January 2027
Contract Commencement	1 February 2027
Implementation and Configuration	February - March 2027
Target Go-Live Date	1 April 2027

Supplier Demonstrations

The Council intends to invite shortlisted tenderers to participate in supplier demonstrations between **11 January 2027 and 15 January 2027**[1].

[1] The demonstration timetable reflects the Christmas and New Year period and Council office closure arrangements

Demonstrations may include:

- User administration and permissions
- Course assignment and enrolment
- Compliance reporting and dashboards
- Microsoft 365 integration
- Content creation and editing
- Policy acknowledgement functionality
- Learner experience and accessibility features
- Mobile functionality
- Management reporting
- System administration and support tools

Tenderers will be provided with reasonable notice of their allocated demonstration slot.

1.2. Contact Details

All clarification requests and tender submissions must be submitted electronically to:

Email: procurement@yeovil.gov.uk

Clarification requests must be submitted no later than the stated clarification deadline.

Clarification responses will normally be issued to all participating tenderers within five working days. The Council reserves the right to anonymise clarification questions and share the response with all tenderers where the information may be relevant to the procurement.

Responses provided verbally shall not form part of the procurement process unless subsequently confirmed in writing by the Council.

Late submissions may be rejected.

Tender Validity Period: 120 days from the Tender Submission Deadline.

2. Executive Summary

Yeovil Town Council is seeking to appoint a suitably qualified and experienced supplier to provide, implement, support and maintain a modern cloud-based Learning Management System (LMS).

The Council requires a secure, accessible and scalable platform capable of:

- Managing mandatory compliance training.
- Supporting employee and councillor development.

- Delivering Council-specific learning content.
- Recording policy acknowledgements.
- Providing comprehensive management reporting and audit trails.
- Supporting organisational learning, resilience and succession planning.

The LMS is expected to support approximately 200 users, including employees, elected members, temporary staff, volunteers and other authorised users.

The Council is seeking a proportionate and cost-effective solution suitable for an organisation of this size and complexity. Suppliers should ensure their proposals reflect the scale of the Council's requirements and avoid unnecessary enterprise-level functionality or costs.

The successful supplier will provide the LMS platform, implementation services, support arrangements, content management functionality and ongoing account management throughout the contract term.

3. Introduction and Background

The Council currently delivers training through a combination of inductions, policy briefings, external providers, professional guidance, online resources and workplace learning.

Whilst these arrangements provide access to learning opportunities, they do not provide a single platform through which learning activity can be assigned, monitored, evidenced and reported consistently across the organisation.

The Council therefore wishes to implement a Learning Management System that will:

- Centralise learning and development activities.
- Provide auditable records of training completion.
- Support statutory and regulatory compliance.
- Improve accessibility and consistency of learning provision.
- Reduce administrative burden.
- Strengthen organisational governance and assurance.

The LMS will be used to:

- Deliver mandatory compliance training.
- Track and record learning completion.
- Provide evidence of compliance for audit purposes.
- Host Council-specific information and guidance.

- Support the creation and maintenance of bespoke learning content.
- Record acknowledgements of key Council policies and procedures.
- Support induction, ongoing professional development and succession planning.

4. Procurement Governance

This procurement is being conducted in accordance with the Council's Financial Regulations, Standing Orders and applicable procurement legislation.

The Responsible Financial Officer shall:

- Confirm the lawful basis of the procurement
- Verify approved budget provision
- Ensure all required approvals are obtained
- Maintain a complete audit trail

The estimated contract value shall include implementation, licences, support, maintenance, extension options, content libraries, optional services and all other reasonably foreseeable expenditure.

5. Contract Requirements

- Initial contract term: **3 years**
- Extension options: **2 x 24-month extensions**
- Maximum contract term: **7 years**
- Contract commencement: **1 February 2027**
- Target go-live date: **1 April 2027**

The Council reserves the right not to exercise any extension option.

6. Strategic Objectives

The Council seeks a solution that will:

- Ensure compliance with statutory and regulatory training obligations.
- Improve accessibility and consistency of training delivery.
- Reduce administrative effort associated with training management.
- Provide robust reporting and audit functionality.
- Enable self-service learning.
- Support councillor development and governance training.

- Facilitate the creation and maintenance of Council-specific learning content.
- Improve organisational knowledge sharing.
- Support policy acknowledgement, understanding and compliance.
- Contribute to organisational resilience and succession planning.

7. Scope of Services

The LMS is expected to support approximately 200 users at contract commencement.

The successful supplier shall provide:

7.1. LMS Platform

A cloud-hosted Software as a Service (SaaS) solution incorporating:

- Secure browser-based access.
- Mobile-responsive design.
- User administration tools.
- Learning assignment and enrolment functionality.
- Compliance monitoring.
- Automated notifications and reminders.
- Reporting and dashboard functionality.
- Content management and document storage.
- Support for video, SCORM, PDF, presentation and multimedia content.

7.2. Implementation Services

Implementation services shall include:

- Project initiation and planning.
- System configuration.
- User setup and import.
- Role and permission configuration.
- Data migration support where required.
- Administrator training.
- Testing support.
- Go-live assistance.

7.3. Support and Account Management

The Supplier shall provide:

- Helpdesk support.
- Technical support.
- Platform maintenance and upgrades.
- Account management.
- Annual service reviews.
- Performance reporting.
- Service Level Agreement commitments.

7.4. Change Management

The Supplier shall operate a documented change management process for any material changes affecting:

- System functionality.
- Hosting arrangements.
- Infrastructure or architecture.
- Third-party integrations.
- Information security controls.
- Artificial intelligence functionality.
- Service availability or performance.

The Council shall be provided with reasonable advance notice of any material changes and shall have the opportunity to assess any impacts on security, compliance, operations or service delivery before implementation

The Supplier shall provide not less than 30 calendar days' notice of any planned material change unless the change is required urgently for security or service continuity reasons.

8. Requirements Classification

Requirements are classified as:

- **Mandatory**
- **Desirable**

Failure to satisfy a Mandatory requirement may result in exclusion from further consideration

9. Functional Requirements

Ref	Requirement	Classification
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

Tenderers must provide evidence demonstrating compliance with each requirement.

10. Course Content Requirements

The Council requires access to a comprehensive learning library.

10.1. Core Mandatory Training (All Staff)

All Staff

- Health and Safety

- Fire Safety
- Data Protection and GDPR
- Cyber Security Awareness
- Equality, Diversity and Inclusion
- Safeguarding Awareness
- Information Governance and Records Management

10.2. Councillors

- Councillor Code of Conduct
- Governance and Decision Making
- Data Protection for Elected Members
- Equality and Safeguarding
- Local Government Finance

10.3. Role-Specific Training

- Finance
- HR
- Grounds and Facilities
- Managers
- Community and Front-Facing Staff

Tenderers shall clearly identify which courses are included within the licence and any additional charges.

11. Content Authoring Requirements

The Council requires the ability to:

- Create bespoke courses
- Amend existing content
- Upload local policies and procedures
- Upload videos and documentation
- Create inductions
- Create assessments and quizzes
- Generate certificates

Appropriate authoring tools and administrator training shall be provided.

12. Training Content Updates and Maintenance

The Supplier shall:

- Maintain statutory and compliance-related content.
- Update content within 30 calendar days of relevant legislative or regulatory changes.
- Maintain version control.
- Operate formal review processes.
- Notify the Council of material content changes.

13. Microsoft 365 Integration Requirements

Mandatory

- Microsoft Entra ID Single Sign-On
- User provisioning and de-provisioning
- Outlook integration
- Microsoft Teams integration
- Automated reminders and notifications

Desirable

- SharePoint integration
- Power BI integration
- Microsoft Graph compatibility
- Advanced user synchronisation

14. Security and Data Protection

The LMS must:

- Comply with UK GDPR.
- Host data within the United Kingdom or another jurisdiction recognised by the UK Government as providing an adequate level of data protection.
- Use encryption at rest and in transit.
- Support role-based permissions.
- Maintain audit logs.

- Provide secure backup and disaster recovery.

The Supplier shall notify the Council of any actual or suspected personal data breach or security incident affecting Council data without undue delay and, in any event, within 24 hours of becoming aware of the incident.

The Supplier shall maintain Cyber Essentials certification as a minimum requirement throughout the contract term. Where held, suppliers should also provide details of Cyber Essentials Plus, ISO 27001 or equivalent information security certifications. Evidence of certification shall be provided with the tender response and maintained throughout the contract term.

Artificial Intelligence

Tenderers must disclose:

- Details of any artificial intelligence (AI) functionality incorporated within the proposed solution, including any generative AI features.
- Whether Council data is used to train, improve or develop AI models.
- Whether Council data is retained by any AI provider.
- Whether AI services are provided directly by the Supplier or through third-party providers.
- The location(s) where AI processing takes place.
- The categories of data processed by AI functionality.
- Available controls enabling the Council to enable, restrict or disable AI functionality.
- Human oversight arrangements relating to AI-generated outputs.
- Measures implemented to prevent unauthorised disclosure of Council data through AI tools.
- Any additional risks, limitations or contractual implications associated with AI-enabled functionality.

The Supplier shall not use Council data for the training or improvement of any artificial intelligence model without the Council's prior written consent.

Tenderers shall complete Appendix G – Data Processing, Security and AI Governance Questionnaire and provide comprehensive responses to all questions relating to artificial intelligence, data protection, information security, hosting arrangements and cyber resilience.

The Council reserves the right to require AI functionality to be disabled where it does not meet the Council's security, governance, data protection or operational requirements.

15. Service Levels and Support

The Supplier shall provide a robust, resilient and reliable Learning Management System service.

The Supplier shall guarantee:

- A minimum system availability of 99.9% per calendar month, excluding agreed scheduled maintenance periods.
- Availability measured on a 24-hour, 7-day basis and calculated monthly.
- Advance notice of planned maintenance activities.
- Continuous monitoring of system performance and availability.
- Defined incident response, escalation and resolution times.
- Prompt restoration of service following any interruption.
- Documented business continuity and disaster recovery procedures.
- Monthly service availability reports upon request.

Tenderers shall provide details of:

- Service Level Agreement (SLA) commitments.
- Incident severity classifications and response times.
- Escalation procedures.
- Recovery Time Objective (RTO).
- Recovery Point Objective (RPO).
- Historical availability performance.
- Business continuity and disaster recovery arrangements.
- Planned maintenance arrangements and notification periods.
- Service credits, rebates or other contractual remedies applicable where service level targets are not achieved
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16. Accessibility

The LMS shall:

- Meet WCAG 2.2 AA requirements.
- Support assistive technologies.
- Be fully functional across desktop, tablet and mobile devices.

- Provide a current accessibility statement.
- Provide evidence of accessibility testing.
- Provide details of any independent accessibility assessment undertaken within the previous 24 months.
- Disclose any known accessibility limitations together with planned remediation activities.

17. Commercial and Legal Requirements

The contract shall include provisions covering:

- Freedom of Information.
- UK GDPR compliance.
- A UK GDPR-compliant Data Processing Agreement between the Council (as Data Controller) and the Supplier (as Data Processor), to be executed prior to service commencement.
- Anti-bribery and modern slavery obligations.
- Insurance requirements.
- Subcontractor controls. The Supplier shall remain fully responsible for the acts and omissions of any subcontractors engaged in connection with the contract.
- Audit rights.
- Termination provisions.

Insurance Requirements

Tenderers shall maintain, as a minimum:

- Employers' Liability Insurance with a limit of indemnity of not less than £10 million.
- Public Liability Insurance with a limit of indemnity of not less than £10 million.
- Professional Indemnity Insurance with a limit of indemnity of not less than £1 million.
- Cyber Liability Insurance with a limit of indemnity of not less than £1 million.
- Evidence of current insurance cover shall be submitted with the tender response and maintained throughout the contract term.

Ownership of Bespoke Content

All bespoke content developed specifically for Yeovil Town Council shall remain the property of Yeovil Town Council.

The Supplier shall:

- Provide editable copies of all Council-funded bespoke content upon request and upon contract expiry or termination.
- Support migration to alternative suppliers.
- Permit unrestricted use of Council-owned content.

Exit and Transition Arrangements

Upon expiry or termination of the contract, the Supplier shall:

- Provide all Council-owned data, records, reports, learner history, audit information and content in a commonly used, machine-readable format.
- No additional licence fees, extraction fees, migration fees or administrative charges shall be payable by the Council for the extraction, return or transfer of Council-owned data.
- Cooperate with the Council and any replacement supplier to facilitate an orderly transition of services.
- Provide reasonable transition support for the transfer of data, content, records and documentation.
- Ensure there are no technical, licensing or contractual barriers preventing the Council from accessing or exporting its data.
- Securely delete Council data following successful transfer and in accordance with agreed retention periods and applicable data protection legislation.

18. Supplier Requirements

Tenderers shall provide:

- Company profile.
- Demonstrable experience providing Learning Management Systems to local authorities, parish councils, town councils or other public sector organisations within the United Kingdom.
- Public sector references.
- Implementation methodology.
- Support arrangements.
- Account management structure.
- Financial standing, including company registration details, VAT registration number (where applicable) and most recent audited accounts or equivalent financial statements.

- Training arrangements.

Tenderers shall provide three client references relevant to the proposed solution. At least one reference must be from a local authority, town council, parish council or other public sector organisation. Preference may be given to suppliers able to demonstrate experience with organisations of a similar size and complexity to Yeovil Town Council.

Financial Standing

The Council reserves the right to undertake financial due diligence and creditworthiness assessments at any stage of the procurement process.

The Council may exclude a tenderer where financial standing presents a material risk to successful contract delivery or long-term service continuity.

Tenderers shall promptly provide any additional financial information reasonably requested by the Council.

19. Contract Management

Regular review meetings shall be held throughout the contract term.

Key performance indicators (KPIs) may include:

- System availability
- Support performance
- User uptake
- Training completion
- Outstanding actions

20. Pricing Schedule

Tenderers shall provide:

Implementation Costs

- Configuration
- Data migration
- Training
- Project management

Annual Costs

- User licences
- Support and maintenance
- Content library access

Optional Costs

- Additional users
- Bespoke content
- Consultancy
- Integrations

All pricing shall be exclusive of VAT.

Prices shall remain fixed throughout the initial three-year term.

21. Evaluation Criteria

Criterion	Weighting
Compliance with Specification	25%
Functionality and User Experience	20%
Quality of Training Content	15%
Implementation and Support	15%
Relevant Experience and References	10%
Security and Data Protection	5%
Cost	10%
Total	**100%**

The lowest compliant evaluated tender price shall receive the maximum available score for the Cost criterion.

Other compliant tender prices shall be scored using the following formula:

(Lowest Evaluated Price ÷ Tenderer's Evaluated Price) × Available Cost Marks

The evaluated price shall be based on the total cost of ownership for the stated contract term, including implementation, licences, support, maintenance, mandatory integrations and all unavoidable charges, exclusive of VAT.

Tenderers must achieve:

- A minimum overall quality score of 60%; and
- A minimum score of 3 out of 5 in each mandatory quality criterion.

22. Submission Requirements

Tenderers shall submit:

1. Completed tender response.
2. Requirements matrix.

3. Pricing schedule.
4. Implementation plan.
5. Sample reports.
6. Service level commitments.
7. Information security documentation.
8. Accessibility statement.
9. References.
10. Exit plan.
11. Data processing information.
12. Total cost of ownership schedule.
13. Completed Conflict of Interest Declaration.
14. Completed Supplier Declaration.
15. Completed Appendix G – Data Processing, Security and AI Governance Questionnaire.
16. Copies of all current security certifications.
17. List of all data processors and sub-processors involved in delivery of the service.

The Council reserves the right to request demonstrations, clarifications and supporting evidence.

All submissions must be provided in Microsoft Word, Microsoft Excel or PDF format.

The Council reserves the right to request editable versions of submitted documents.

23. Reservation of Rights

The Council reserves the right to:

- Amend, suspend or withdraw the procurement
- Request clarification
- Reject any or all tenders
- Not award a contract
- Award the contract in whole or in part

Tenderers shall bear their own costs associated with participation.

24. Appendices

Appendix A: Requirements Response Matrix

Appendix B: Pricing Schedule

Appendix C: Demonstration Script

Appendix D: Conflict of Interest Declaration

Appendix E: Supplier Declaration

Appendix F: Reference Template

Appendix G: Data Processing, Security and AI Governance Questionnaire