



Request for Proposal

Tender for Provision of an Online Assessment

Agreement Period

2021-2023

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1. Introduction

This is an invitation to bid for the INTOSAI Development Initiative's (IDI) tender for the provision of an online assessment platform and the associated management of an online assessment process for the Professional Education for SAI Auditors (PESA) pilot.

2. IDI

The INTOSAI Development Initiative (IDI) is a part of the International Organisation of Supreme Audit Institutions (INTOSAI) and works together with INTOSAI Goal Committees, Regional Organisations, SAIs and other partners for independent, well-governed, professional and relevant SAIs.

IDI is a not-for profit, autonomous INTOSAI body mandated to support Supreme Audit Institutions (SAIs) in developing countries to sustainably enhance their performance and capacity.

IDI's work builds on the successes of INTOSAI, including the International Standards for Supreme Audit Institutions (ISSAIs). IDI maximises its value to SAIs by focusing on areas where its unique position and experience gives it a comparative advantage over other providers of support.

IDI focuses efforts on four work streams to support independent, well-governed, professional and relevant SAIs. These are implemented at the global, regional and SAI-levels. Work streams include developing and implementing Global Public Goods (GPGs), lessons learned, and education initiatives. It also involves creating resource pools, being a centre for knowledge and innovation, communication and advocacy work, and supporting groups of SAIs with similar needs.

IDI also fulfils a global role to strengthen support to SAIs. This is achieved by supporting strategic partners, including INTOSAI Regions, and by measuring and monitoring SAI performance, matching SAI needs to providers of support, and engaging in advocacy and communications to maintain and strengthen support to SAIs. This global role includes functions that support the aims of the Memorandum of Understanding between the INTOSAI and Donor communities, based on coordination and dialogue between the INTOSAI-Donor Cooperation and IDI.

IDI's unique position allows it to deliver its support through a sustainable, needs-based approach which empowers SAIs while promoting gender-responsiveness and peer-to-peer cooperation as essential elements of long-term capacity development. This approach combines theory with practical application through initiatives such as facilitated organisational assessments, cooperative audits, professional education and quality review mechanisms. It brings together institutional, organisational and professional capacity development to deliver sustainable change in the independence, governance, professionalism and relevance of SAIs.

To increase reach, one initiative will use non-mentor led programmed Digital Education. Further information is available at <https://www.idi.no/work-streams/professional-sais/pesa-p>.

Additional information about the IDI is available on www.idi.no.

3. The Procurement

3.1 Description of the Assignment

The PESA pilot online assessment is intended to assess learners who have completed the Digital Education for professional auditors working in SAIs.

- **PESA-P structure:** a “cross-cutting” stream and 3 functional audit streams (for the 3 types of audit: compliance, financial, and performance). A pilot is running with approximately 800 registered participants, from more than 80 different countries, with between 200-300 in each functional audit stream. The registered participants are also supported by 400 work-based coaches.
- **PESA-P participants :** PESA-P includes learners from both developing and developed countries spread across the world. The content developed is appropriate to the needs of learners in the diverse SAI context.
- **PESA-P Structure:** The education consists of two phases. In the first phase we cover the cross-cutting stream content and the second phase will offer functional streams of education. Both phases have fixed start and end dates.
- **PESA-P Assessment:** The digital education has been prepared for four streams. The assessment will need to cover the cross-cutting stream and each of the three functional streams, with participants registering to sit the cross-cutting stream and one of the three functional streams locally, with human proctoring, online or in an external test centre. The first run of the assessment would be completed by an estimated 500 participants, with further sittings running at six-monthly intervals used for remaining participants, coaches and retake candidates.
- **Reach:** global, and to be piloted in English, with an option to translate into Spanish, French and Arabic at a later stage.
- **Availability:** The education is being delivered in the virtual environment provided by IDI (IDI LMS is based in Moodle version 3.3.2). The assessment will not be open access – it will only be available to those registered applicants who fulfil certain criteria (SAI auditors who complete a mandatory 100 hours of education (20 hours of cross-cutting, 50 hours of functional audit stream papers and 30 hours of social learning and produce an Initial Professional Development Portfolio (IPDP) will be eligible to take the PESA-P Assessments) and complete a registration process which should be included as part of the tender submission.

3.2 Expected final products

Four secure online assessments in English, ready to deliver to candidates by May 2022, with access to Mock exams no later than April 2022. Questions will be prepared by the IDI in a range of formats available within the selected platform. The vendor should be able to accurately populate the content into the assessment tool, maintaining the integrity of the exam.

The online assessment platform should:

- provide a secure candidate registration portal for online assessment sitting, with provision for candidate retests
- provide for access to practice tests to support candidate familiarisation
- provide for a mock exam experience, to replicate the formal assessment with capacity for multiple versions of the mock exam paper

- deliver two secure assessments using a bank of secure assessment question and case study resources, for each candidate
 - a cross-cutting stream exam of 90 mins, followed by (on a separate date)
 - a functional stream exam of 180 mins
- provide candidate live (human) proctoring/invigilation for each candidate attempt of the secure assessment exams
- offer two exam sittings each calendar year, within a limited window (period of time)
- provide auto-marking of candidate assessment attempts
- allow publishing of results, following a moderation and review process of the exam questions and candidate attempts, in the individual candidate portal
- produce a range of data analytics and reporting to support moderation of the exam sitting and review of the questions used

The IDI and the vendor will jointly agree the process and methodology to be followed to design, develop and deliver the online assessment. The IDI will approve the final delivery of the assessment.

Technical support for the IDI and candidates, provided during the contract period.

The tender should meet the conditions and requirements specified in this tender document.

3.3 GDPR Compliance:

According with the EUROPEAN General Data Protection Regulations (GDPR) the selected provider must have:

Mandatory:

- ISO/IEC 27000-series certification

Good to have:

- A published privacy policy/notice
- Terms of service
- Record of processing activities
- Records management policy
- Reports of external audits on information security

The selected provider must sign one of the following GDPR documents:

- Data Processor Agreement Template (Appendix 1) for providers within the EU
- Data transfer contract controller to processor (Appendix 2) for providers outside the EU and 12 “adequate protection” countries

3.4 Ownership of content

IDI will provide content and retain copyright for internally produced content. The vendor will digitalise this content. The IDI will receive ownership of the final product and be able to change the content, translate and distribute as they see fit after the initial contract period.

3.5 Contact Person

Written questions about the assignment can be directed to stephen.gyte@idi.no.

3.6 Timelines

The deadline for questions about the contract is 24 September 2021. Questions received after the deadline will not be responded to.

Deadline for tenders:	1 October 2021
Assessment:	A Procurement Committee consisting of IDI leadership and relevant staff and associates will assess the received bids and decide on the final procurement, in line with the IDI Procurement policy.
Validity of tender	1 December 2021

3.7 Language

All communication between the parties will be done in English. The tender shall be submitted in English.

3.8 Contract Period

The initial contract period will run from 1 January 2022 to 31 December 2023, with the option to extend for a further 12 or 24 months.

3.9 Submission of tender

Address:	INTOSAI Development Initiative Stenersgata 2, 0184 Oslo
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The offers may also be submitted by email to stephen.gyte@idi.no or pesa-p@idi.no by 1 October 2021.

3.10 Required documentations

- Signed letter including a detailed technical proposal, terms and conditions and the financial offer. Potential reservation shall be stated clearly in the letter with reference to where in the offer the reservations are stated (page number)
- Completed question template (Appendix 3)
- Tax and VAT certificates of the bidder
- Documentation on the legal registration of the bidder

- Documentation on the GDPR compliance arrangements of the bidder
- Documentation on the financial position of the bidder
- Documentation of the professional qualifications of the bidder including the CV of the responsible manager
- Self-declaration on Health, Safety and Environment
- List of references, including any organizations similar in nature to the IDI
- Examples of similar work done for awarding bodies

If any of the documents in the table are missing, the bidders must provide suitable explanation to the IDI.

3.11 Assessment of offers

Disclosure: The IDI will provide written feedback if a tender is not accepted, or if no tenders are accepted or the tendering process is cancelled.

Confidentiality: All bid documents will be treated confidentially by the IDI.

3.12 Criteria for assessment of offers

The Procurement Committee will only consider bids, in line with the IDI Procurement Policy, that provide all the required documents mentioned above.

The Procurement Committee will evaluate the technical proposal as per the following criteria

1. Track record of the offeror (10%).

The offeror has proven experience in delivery of online assessment and remote proctoring.

2. Ability to deliver the project as per indicated timelines (10%).

The scope of the proposal is well defined, as requested in the terms of reference.

The scheduling of the proposal matches what is requested in the terms of reference.

3. Scalability, accessibility, security, innovation and visual appeal of the assessment to be developed (50%).

The offeror proposes a variety in question style and format, with context and authenticity in assessment design, which is visually appealing, functional and utilizes appropriate innovation in technology to support assessment integrity and security.

The offeror proposes a range of data analytics and reporting to support moderation and review of the integrity of the assessment activity.

The platform should ensure candidate accessibility in multiple locations, and the offeror should be able to demonstrate their knowledge of the geographical spread of candidates and their technology need, in order to support candidates' successful completion of the assessment the learning outcomes of the education.

The submission should provide details about the measures used to ensure the integrity of the exam and the use of randomisation in using a question bank to deliver a candidate exam.

Offers must receive at least 40% to be submitted for the economic assessment. The economic assessment criteria are as follows:

4. Lowest cost criteria (30%).

$(\text{price of lowest acceptable bid} / \text{price of assessed bid}) * 30$

3.13 Expenditures incurred in preparing the bid

Bidders will have to cover all costs regarding the tendering process and no costs will be reimbursed by the IDI.