

RCloud Tasking Form – Part B: Statement of Requirement (SoR)

Title of Requirement	Development of a Handbook for the Evaluation of Personalisation of Learning Approaches
Requisition No.	As stated in the RCloud Portal
SoR Version	V4

1.	Statement of Requirements
1.1	Summary and Background Information
	<p>The <i>Developing Education, Learning and Training Advances</i> (DELTA) project within the <i>Future Workforce and Training</i> (FWT) programme has a requirement to provide the Ministry of Defence (MoD) with evidence-based advice, recommendations and tools to inform decisions around the adoption and provision of high quality personalised learning as a component of Defence training and education.</p> <p>This Statement of Requirement (SOR) outlines work to develop a Handbook that stakeholders can use to consider the business case for adopting Personalisation of Learning (PL) approaches and evaluate their effectiveness. This work will involve converting an existing PL Decision Support Process (currently in .docx format) and an existing PL Evaluation Framework (currently in .xlsx format) into a Handbook.</p> <p>The Personalisation of Learning (PL) is “<i>the orchestration of a customised learning experience that is tailored for and/or adapted to the requirements of the individual learner, in order to optimise learning outcomes in line with the organisational goal(s)</i>” (Deighton & Mundy, 2019). Approaches to PL include Intelligent Tutoring Systems, Adaptive Learning Systems and Personal (virtual) Learning Assistants. Recent MOD-commissioned research (Deighton & Mundy, 2019; Newell et al., 2022 – to be provided as GFI) highlighted currently available approaches to PL, how to evaluate their effectiveness, and their potential benefits to Defence training organisations (examples include improvements in training efficiency, operational effectiveness, learner achievement, learner engagement and learning culture). Two key outputs from this research were a Decision Support Process and an Evaluation Framework, which are described in more detail below. The purpose of the work outlined in this SOR is to convert the current versions of the Decision Support Process and Evaluation Framework into a Handbook. The aim is to provide stakeholders with a single document, which provides a user-friendly and visually appealing guide to applying the Decision Support Process and Evaluation Framework.</p>

Decision Support Process

The Decision Support Process, developed by Deighton and Mundy (2019), is a tool for Defence training establishments to *“inform decision-making relating to the implementation and sustainability of PL within an organisation. The PL Decision Support Process offered provides the means to identify:*

- *whether PL is right for the organisation in a particular context and at a given time;*
- *where the organisation is right now;*
- *where the organisation needs to be in order to implement a particular PL approach effectively; and,*
- *information that could support the development of a business case.”* (Deighton & Mundy, 2019, pp. 30).

The Decision Support Process consists of eight steps which involve, for example:

- Identifying the organisation’s goals surrounding the use of a personalised learning approach
- Identifying measures that can be used to indicate the effectiveness of a PL approach and its ability to meet the organisation’s goals;
- Identifying the most important factors within the organisation that could influence the implementation and sustainability of personalised learning.

The Decision Support Process is currently presented in a .docx and .pdf format as part of a technical report (Deighton & Mundy, 2019). It is presented in diagrammatic form with supporting text, figures, tables and worked examples. A significant component of the Decision Support Process is the application of an ‘Influence matrix’ (presented in tabular form within the technical report) which involves the user rating the importance (critical, high, medium, low) of 36 factors in terms of their impact on the implementation and sustainability of PL in the user’s organisation.

Evaluation Framework

Newell et al. (2022) developed an Evaluation Framework designed to *“provide Defence training establishments with guidance on evidenced measures and metrics that should be collected to assess the benefits of any PL that they may introduce”* (pp. 11). It is intended to inform the Decision Support Process and to assess *“whether the level of benefit achieved by PL might outweigh the time, cost and resources required to develop PL courses on a large scale”* (pp. 11).

The Evaluation Framework provides the user with a tool that guides them through the process of:

- Identifying their organisation’s goals for adopting a personalised learning approach;

- Considering the outcomes that should be measured to assess the effectiveness of the personalised learning approach against the organisational goals;
- Identifying the methods and metrics that should be used for measuring these outcomes.

The Evaluation Framework is currently presented as an Excel workbook comprised of multiple tabs. Some tabs provide text-based information (e.g. background information, guidance on using the framework, descriptions of key terms). The remaining tabs are comprised of tables, which form the basis of the evaluation process and enable the identification of methods and metrics to assess the effectiveness of the PL approach against organisational goals. Hyperlinks aid navigation around the tool.

1.2 Requirement

The requirement is to develop a Handbook that combines the Decision Support Process and the Evaluation Framework into a single document. The Handbook must be:

- A comprehensive step-by-step guide to applying the Decision Support Process and the Evaluation Framework.
- A standalone tool (i.e. there should be no need to refer to other documents in order to understand or implement the Decision Support Process and the Evaluation Framework).
- Visually well-presented and engaging - stylistically, it should resemble a brochure (it must not be presented in the format of a technical report).
- Targeted at MoD personnel from training establishments across Army, Navy, Air Force, Strategic Command and the Civil Service including:
 - o Decision makers – i.e. those involved in developing a business case for adopting personalised learning approaches;
 - o Personnel involved in the design, delivery, analysis and assurance of training who might be involved in evaluating the effectiveness of personalised learning approaches.

The Handbook must incorporate all of the key features of the Decision Support Process (as described in Deighton & Mundy, 2019) such as the 8-step process and the Influence Matrix. It must also capture all of the key features of the Evaluation Framework (as described by Newell et al 2022) such as the organisational goals, outcomes, methods and metrics.

The development of the Handbook must include user testing with stakeholders. Proposals are to outline the suggested approach to user-testing - i.e. the likely time points for user testing and the number of stakeholders required to provide confidence that the Handbook is user-friendly and fit

	<p>for purpose. The supplier will be responsible for designing and carrying out the user testing. The Dstl Technical Partner (TP) and Military Advisor (MA) will facilitate identification of and access to stakeholders and support the user testing activities but will not be responsible for the delivery of or the coordination/logistical arrangements of these activities.</p> <p>The supplier shall:</p> <ol style="list-style-type: none"> 1. Attend a Contract 'start-up meeting' within 10 working days of contract award at Dstl Porton Down or Dstl Portsdown West (date tbc by Dstl) to present and agree the details of the study and the format and structure of study outputs. Presentation to be delivered in PowerPoint format. 2. Schedule and run fortnightly teleconference progress meetings with the Dstl TP (dates tbc). Following each teleconference, the supplier team shall provide the Dstl TP with a summary of the points discussed including a Record of Decisions (RoDs) and agreed actions (via email). Dates for these teleconferences are to be agreed at the start-up meeting.
<p>1.3</p>	<p>Options or follow on work <i>(if none, write 'Not applicable')</i></p>
	<p>Not applicable</p>
<p>1.4</p>	<p>Contract Management Activities</p>
	<p>The supplier shall:</p> <ol style="list-style-type: none"> 1. Attend a Contract 'start-up meeting' within 10 working days of contract award at Dstl Porton Down or Dstl Portsdown West (date tbc by Dstl) to present and agree the details of the study and the format and structure of study outputs. Presentation to be delivered in PowerPoint format (subject to availability this could be held over MS Teams). 2. Schedule and run fortnightly teleconference progress meetings with the Dstl TP (dates tbc). Following each teleconference, the supplier team shall provide the Dstl TP with a summary of the points discussed including a Record of Decisions (RoDs) and agreed actions via email. Dates for these teleconferences are to be agreed at the start-up meeting.
<p>1.5</p>	<p>Health & Safety, Environmental, Social, Ethical, Regulatory or Legislative aspects of the requirement</p>

	N/a
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1.6 Deliverables & Intellectual Property Rights (IPR)						
Ref.	Title	Due by	Format	Expected classification (subject to change)	What information is required in the deliverable	IPR Condition
D - 1	Slides and Record of Decisions from the start-up meeting.	5 working days after the start-up meeting	Powerpoint (.pptx)	O	The slides are to include, as a minimum, details on the aim and objectives of the research, the planned methodological approach, milestones and timelines, risks and dependencies, Record of Decisions.	DEFCON 705 shall apply
D – 2	Initial Task Summary	3 weeks after the start-up meeting	Word document (.docx)	O	A one- page summary of the task (a standardised template will be provided by Dstl); sections to complete include, but are not limited to, the task aims, approach, outputs and planned exploitation.	DEFCON 705 shall apply
D – 3	Handbook	T0 + 6 months	Pdf	O	A brochure-style handbook that combines the Decision Support Process and the Evaluation Framework and provides step-by-step guidance on their application.	DEFCON 705 shall apply

D - 4	User-testing report	T0 + 6 months	Word document (.docx)	O	Short report (maximum of 10 pages) documenting the methodology and key findings from the user testing.	DEFCON 705 shall apply
D - 5	Final Task Summary	T0 + 6 months	Word document (.docx)	O	An updated version of the one- page summary of the task (a standardised template will be provided by Dstl); sections to complete include, but are not limited to, the task aims, approach, outputs and planned exploitation.	DEFCON 705 shall apply

1.7	Deliverable Acceptance Criteria
	<ul style="list-style-type: none"> • All Reports included as Deliverables under the Contract e.g. Progress and/or Final Reports etc. must comply with the Defence Research Reports Specification (DRRS) which defines the requirements for the presentation, format and production of scientific and technical reports prepared for MoD. • Interim or Progress Reports: The report should detail, document, and summarise the results of work done during the period covered and shall be in sufficient detail to comprehensively explain the results achieved; substantive performance; a description of current substantive performance and any problems encountered and/or which may exist along with proposed corrective action. An explanation of any difference between planned progress and actual progress, why the differences have occurred, and if behind planned progress what corrective steps are planned. • Final Reports: shall describe the entire work performed under the Contract in sufficient detail to explain comprehensively the work undertaken and results achieved including all relevant technical details of any hardware, software, process or system developed there under. The technical detail shall be sufficient to permit independent reproduction of any such process or system. • All Reports shall be free from spelling and grammatical errors and shall be set out in accordance with the Statement Of Requirement (1) above. • Failure to comply with the above may result in the Authority rejecting the deliverables and requesting re-work before final acceptance.

2	Evaluation Criteria
2.1	Method Explanation
	<p>This Tender will be evaluated on the basis of the Most Economically Advantageous Tender (MEAT): VFM Index.</p> <p>This is a comparative score and the scoring method is worked out using the calculation below.</p> <p style="text-align: center;">Tenderers score = Total Technical Score/Firm Price x 1000</p> <p>The optimum is the highest technical score and lowest price, this together would get the highest total score.</p> <p>In the event of two or more Tenders being awarded the same total score the Authority shall choose the Tender with the highest Technical score.</p> <p>Tenderers are to provide responses to all award criteria questions.</p> <p>The example below is designed to help tenderers understand the pricing evaluation model, and is for illustration purposes only:</p>

Insert Classification

	Supplier	Total Technical Score	Cost	Score	Rank	
	A	30	£70,000.00	0.43	4	
	B	90	£85,000.00	1.06	1	
	C	50	£90,000.00	0.56	3	
	D	45	£60,000.00	0.75	2	
	In this scenario, the contract would be awarded to supplier B.					
2.2	Technical Evaluation Criteria					

Technical evaluation will be carried out by a team of between 3 and 5 assessors who will review the technical proposals independently and then bring their scores to a moderation meeting. The moderation meeting will be chaired by the Dstl Project Manager.

The moderation meeting will discuss each Tenderer’s response in turn and attribute a moderated technical score to each of the technical criteria and a final score calculated.

Technical criteria are provided below

Note 1: The Authority reserves the right to reject any Tender if a contractor scores below a 30 for any technical criteria. Please see beneath for further information on how each limb will be scored: Dstl reserve the right to reject any bid deemed to be non-compliant.

Note 2: The weighted scores on each limb will be added together to give a final technical score. Each technical assessor will perform an individual evaluation and then a final moderated technical score will be arrived at in the moderation meeting.

Ref	Criteria	Available Score	Weighting	Total Available Score (Score x weighting)
T1	The proposal clearly demonstrates that the Contractor understands the requirement.	0-100	10%	10
T2	The proposal clearly demonstrates that the Contractor and any nominated personnel have the expertise and knowledge to successfully deliver the requirement.	0-100	30%	30
T3	The proposal clearly demonstrates that the Contractors proposed approach will fully address all the key research	0-100	60%	60

	<p>questions / mandatory requirements stated in the SoR. Proposal should include the following: a detailed work breakdown structure, schedule, roles and responsibilities, exploitation plans, risks and dependencies.</p>			
				Total:100
<p>T1. The proposal clearly demonstrates that the Contractor understands the requirement.</p>				
Score	Key Indicators			
100 = Exceeds	<p>Demonstrates a comprehensive understanding of the Authority’s requirements and objectives, – illustrating knowledge that goes significantly beyond that presented in this Statement of Requirement;</p> <p>Provides excellent insights into how the context and associated requirements may evolve - going well beyond the material presented in the statement of requirement.</p>			
70= Fully meets	<p>Demonstrates a close to comprehensive understanding of the Authority’s requirements – illustrating knowledge that goes beyond that presented in this Statement of Requirement;</p> <p>Provide good insights into how the context and associated requirements may evolve - going beyond the material presented in the statement of requirement.</p>			
30= Adequately meets	<p>Demonstrates an understanding of the Authority’s requirements;</p>			

		Provide some insights into how the context and associated requirements may evolve - going beyond the material presented in this statement of requirement.
0 = Fails to meet		fails or has shortfalls in demonstrating an understanding of the question area / requirement – for example, simply mirroring the information presented in this Statement of Requirement or failing to demonstrate understanding of the question area / requirement
		Offers little or no insight into how the context and associated requirements may evolve.
<p>T2. The proposal clearly demonstrates that the personnel the Contractor has nominated to work on the requirement have the relevant experience to successfully deliver it.</p>		
Score	Key Indicators	
100 = Exceeds	Demonstrates that the contractor and nominated project team have comprehensive expertise and relevant experience to successfully deliver this requirement.	
70= Fully meets	Demonstrates that the contractor and nominated project team have close to comprehensive expertise and relevant experience to successfully deliver this requirement.	
30 = Adequately meets	Demonstrates that the contractor and project team have satisfactory expertise and relevant experience to successfully deliver this requirement.	
0 = Fails to meet in a minor respect	Demonstrates that the contractor and project team have limited or inadequate expertise and relevant experience to successfully deliver this requirement.	
<p>T3. The proposal clearly demonstrates that the Contractors proposed approach will fully address the key research questions / mandatory requirements stated in the</p>		

SoR. The Proposal should include the following: a detailed work breakdown structure, schedule, roles and responsibilities.	
Score	Key Indicators
100= Exceeds	Provides a comprehensively detailed technical approach, illustrating how it may evolve during the life of the contract;
	Comprehensively addresses all of the key research questions / mandatory requirements;
	Provides significant additional relevant information and clear insights;
	Provides strong examples and reasoning to back up any arguments presented, including reference sources;
	Demonstrates excellent awareness of key challenges and provides significant detail on how they may be addressed.
70 = Fully meets	Provides a comprehensively detailed technical approach;
	Comprehensively addresses all of the key research questions / mandatory requirements;
	Provides some additional relevant information or insights;
	Provides some examples and reasoning to back up any arguments presented, including reference sources;
	Demonstrates good awareness of key challenges and how they may be addressed.
30 = Adequately meets	Provides a satisfactorily detailed technical approach;
	Satisfactorily addresses all of the key research questions / mandatory requirements;
	Provides little additional relevant information or insights;

		Provides few examples and reasoning to back up any arguments presented, including reference sources;
		Demonstrates awareness of some of the key challenges and how they may be addressed.
	0 = Fails to meet	Provides limited or inadequate detail in the technical approach;
		Limited or inadequate consideration of the key research questions / mandatory requirements;
		Provides no additional relevant information or insights;
		Provides insufficient or no examples, and/ or little/no reasoning, to back up any arguments presented;
Demonstrates limited or no awareness of key challenges and how these may be addressed.		
2.3	Commercial Evaluation Criteria	
	Failure on any of below will be deemed as non-complaint, and will result in your tender being withdrawn.	
	Criteria	Pass/Fail
	Tenderers are required to provide a full breakdown of the prices proposed for the requirement as per the SOR, utilising the rates which are to be used under RCloud.	
	Provision of full details of the points of contacts for commercial, project management & technical, for the proposed contract duration.	
	The Tenderer must provide a Firm Price to undertake the work detailed in the core requirement	