REQUEST FOR EXPRESSIONS OF INTEREST
(CONSULTING SERVICES – INDIVIDUAL SELECTION)

COUNTRY – Trinidad and Tobago
OECS Regional Health Project
Loan No. IDA-D5120
Project No.: P168539

Assignment Title: Upgrade and Maintenance of Capacity for the e-Learning Platform

Reference No. **TT-CARPHA-224882-CS-INDV**

The Caribbean Public Health Agency (CARPHA) has received financing from the World Bank toward the cost of the OECS Regional Health Project and intends to apply part of the proceeds for consulting services.

The consulting services ("the Services") is to ensure that the requisite elements and commitments are in place to provide consistent Learning Management Systems (LMS) services for the Moodle LMS platform, support and delivery to the CARPHA Moodle LMS Project Lead and Information Technology Services (ITS) Team. The services are expected to take nine (9) months to complete and is scheduled for 2021.

The detailed Terms of Reference (TOR) for the assignment is attached to this request for expressions of interest. (See Annex A)

The Caribbean Public Health Agency (CARPHA) now invites eligible consulting individuals ("Consultants") to indicate their interest in providing the Services. Interested Consultants should provide information demonstrating that they have the required qualifications and relevant experience to perform the Services. The shortlisting criteria is as follows:

Qualification Requirements for the Key Expert

Academic Qualifications

- Bachelor's degree in Information Technology or equivalent field and / or relevant experience

Specific Experience

- Prior experience managing an LMS with multi-language versions/content desired.
- Experience using Moodle required.

General Experience

- Minimum of 5-10 years of experience working with Moodle Learning Management Systems (LMS) (uploading, testing, and supporting content in multiple formats) or equivalent combination of education and experience.

Languages

- Excellent knowledge of English – written and spoken

IT Skills

- Broad knowledge of Moodle LMS industry language, standards, and ability to communicate with CARPHA ITS and vendors regarding interfaces, system requirements and problem solving.

Other requirements

- Excellent written and interpersonal communication with meticulous attention to detail.
- Excellent organizational, project management, multi-tasking and problem-solving skills

The attention of interested Consultants is drawn to Section III, paragraphs, 3.14, 3.16, and 3.17 of the World Bank's "Procurement Regulations for IPF Borrowers" July 2016 ("Procurement Regulations"), setting forth the World Bank's policy on conflict of interest. In addition, please refer to the following specific information on conflict of interest related to this assignment (i.e., 3.17 of the Procurement Regulations).

A Consultant will be selected in accordance with the Individual Consultant Selection Method set out in the Procurement Regulations.

Further information can be obtained at the address below during office hours 8:00am to 4:00pm Mondays to Fridays.

Expressions of interest must be delivered in a written form to the address below by e-mail by October 19th, 2021.

Caribbean Public Health Agency
Kern Cassell – Procurement Officer
16-18 Jamaica Boulevard, Federation Park
Port-of-Spain, Trinidad and Tobago
Tel: 1-868-622-4261
Fax: 1-868-622-2792
E-mail: casselke@carpha.org

ANNEX 1

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TERMS OF REFERENCE

**ACTIVITY 2.1.1.5.1 – INDIVIDUAL CONSULTANCY FOR THE
UPGRADE AND MAINTENANCE OF CAPACITY
FOR THE E-LEARNING PLATFORM AT CARPHA FOR THE
WORLD BANK FUNDED ORGANISATION OF EASTERN CARIBBEAN STATES
REGIONAL HEALTH PROJECT**

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1. Background

The Caribbean Public Health Agency (CARPHA) is a regional Institution of the Caribbean Community, formerly established on July 4, 2011 through the ratification of an Inter-Governments Agreement (IGA) by Heads of Member States of CARICOM in January 2013. The Agency is the Caribbean's collective response to addressing public health issues including those related to Communicable and Non-Communicable diseases; mental health, disaster response, injuries and violence and workers health.

In so doing, CARPHA has subsumed the functions of the previous five Regional Health Institutions (RHI) – The Caribbean Epidemiology Centre (CAREC), the Caribbean Food and Nutrition Institute (CFHI), the Caribbean Health Research Council (CHRC), the Caribbean Regional Drug Testing Laboratory (CRDTL) and the Caribbean Environmental Health Institute (CEHI). The agency began operation in January 2013 with Headquarters in Port of Spain Trinidad and offices in Saint Lucia and Jamaica.

CARPHA'S mission is to provide strategic direction, in analysing, defining and responding to public health priorities of Member States to prevent disease promote health and respond to public health emergencies.

Approved in 2019, the Organisation of Eastern Caribbean States (OECS) Regional Health Project (RHP), is a five (5) year project funded by the World Bank. The overall objective of the project is to (i) improve preparedness capacities of health systems for public health emergencies in the OECS region, and (ii) provide a response in the event of eligible crises or emergencies. The OECS RHP is implemented by four CARPHA member states (Dominica, Grenada, Saint Lucia and Saint Vincent and the Grenadines), CARPHA and the OECS Commission.

The areas of focus revolve around improving International Health Regulations (IHR) core capacities in the areas of surveillance, laboratories, workforce development and emergency management. There are four Components under this project; (i) Improved Health Facilities and Laboratory Capacity, (ii) Public Health Surveillance, Preparedness and Response (iii) Institutional Capacity Building, Project Management and Coordination, and the Contingency Emergency Response Component (CERC) implemented at country level.

This consultancy is aligned to Component 2, Public Health Surveillance, Preparedness and Response, Sub Activity 2.1.1.5 – Upgrade and maintain capacity for eLearning Platform, of the OECS Regional Health Project currently being implemented by CARPHA. Currently, the eLearning Platform - Learning Management System (LMS) is a software application which is used for the administration, tracking, reporting and delivery of educational and development training programs The application will be utilized for the Caribbean Field Epidemiology and Laboratory Training Programme. Many countries utilize some form or aspect of a Health Information System (HIS), however, they are subject to updates in real time, limited interoperability and maintenance. This Consultancy will address the maintenance of the platform in order to promote managed training programmes to support a competent workforce that can contribute towards a well-coordinated public health emergency response.

CARICOM Member States face many challenges in relation to their human resource for health (HRH) capacity to support health development in the Caribbean Region. This includes the availability and quality of basic skills and competencies, and the ability to train and certify the health workforce in response to identified health systems' needs, as seen in the Caribbean Cooperation in Health IV (CCH IV) regional agreement document. With the International Health Regulations (IHR) coming into force in 2005, the need to strengthen national disease prevention, surveillance, control and response systems (IHR Area of Work #2), and the need to focus on building human resource capacity to effectively respond to public health emergencies of international concern, is quite clear. This was captured in the PAHO/WHO 2014 Update on the Status of Regional International Health Regulations (IHR) Implementation in the English- and Dutch-speaking Caribbean, which indicated a mean score of 50% for human resource capacity in the Region.

In response to this need, a Caribbean Field Epidemiology and Laboratory Training Programme (FELTP) was developed and implemented in 2014. The programme is currently providing training in field epidemiology at a basic (Level I) and intermediate level (Level II). CARPHA Member States have expressed their interest and appreciation of the programme based on measured outcomes and the demand for the programme currently outstrips the present funding pool. FELTP is one HRH systems strengthening strategy that CARPHA offers, however training is required in other specialized areas such as Laboratory, Surveillance, Health Information, Monitoring and Evaluation, Research, Nutrition, NCDs, Data analysis, Environmental Health.

There is a need to streamline training across the entire organisation, ensuring that all workshops and training programmes meet specific standards, which will facilitate future accreditation. The goal should be not only to accredit individual training programmes, but CARPHA as a training institution. This will serve to increase the credibility of the Agency and its programmes, and allow CARPHA to compete on a global scale, specifically with respect to continuous professional development for public health personnel.

CARPHA currently uses the Moodle application with several training courses on this system. The Moodle application is on an open source LMS that is maintained by their Moodle Community. CARPHA is seeking to engage a Consultant who would assist in maintaining the current application by providing timely updates to the application and ensuring 99% availability by assisting CARPHA ITS Staff in addressing Moodle issues beyond their capability. The Consultant would be required to respond in a timely manner to ensure that courses are available to students and troubleshoot any issues.

2. Objective(s) of the Assignment

The overall **objective** is:

To contribute towards the strengthening of the surveillance systems of the Caribbean through the knowledge management and administration of the eLearning Platform - Learning Management System (LMS) service for the Caribbean Field Epidemiology and Laboratory Training Programme. This service will facilitate access to training modules and information in the FELTP.

The **purpose** of this assignment is:

To ensure that the requisite elements and commitments are in place to provide consistent Learning Management Systems (LMS) services for the Moodle LMS platform, support and delivery to the CARPHA Moodle LMS Project Lead and Information Technology Services (ITS) Team.

3. Scope of Services, Tasks (Components) and Expected Deliverables

The consultant would be expected to:

i. Review the current Moodle LMS, document and report initial findings, issues, and proposed an action plan for addressing issues identified in initial findings.
ii. Provide software maintenance inclusive of incorporating releases and updates and upgrade of the existing Moodle LMS to Moodle 3.11.
iii. Ensure system scalability and stability by developing and enforcing standards, policies, processes, workflows and advanced reporting for the learning management system, including quality control, and change management by maintaining test and production instances
iv. Create and Manage a Test instance of the upgraded Moodle 3.11 application to facilitate user acceptance testing (UAT) of changes to the application before implanting into the production system
v. Provide troubleshooting assistance for users regarding logging in to the LMS and accessing courses.
vi. Troubleshoot, diagnose, report on and resolve issues relating to system functionality, system software and other issues reported by the LMS Project Lead.
vii. Prepare patches that include the resolution of one or more of the incidents reported.
viii. Carry out a Request Analysis relating to the analysis and discussion of the new functionality(s) and technical estimate.
ix. Serve as point of escalation for support issues, which may include interaction with Moodle LMS vendor and other vendor support services.

x.   Review and monitor system performance.

xi.   Ensure the application is consistently backed up, daily, weekly and monthly.

xii.   Work with the instructional technologist and instructional design Consultants hired by CARPHA to troubleshoot and resolve technical issues related to accessing the Moodle LMS and course content.

xiii.   Request Estimation relating to the itemization of required activities from analysis to be carried out for the assessment and implementation, of each one of activities in workload and estimated delivery time.

xiv.   Upgrade the Moodle LMS platform, and advise of the requirement of additional platform resources, plugins, and any additional software

xv.   Quarterly reporting of the work done.

Expected Deliverables Include:

i.   **Inception Report**: Detailed workplan with timelines for completing the consultancy, with key milestones and expected deliverables clearly identified.

ii.   **Initial Summary Report:** Detailed report of Findings of the review of the current LMS

iii.   **Quarterly Reports:** Reports submitted detailing work done for the reporting period, due 7 days after each quarter.

iv.   **Draft Final Report:** Summary of progress with implementation of the Tasks set out above, summary of findings, recommendations, update information, errors and issues resolution, test instances and utilization. An annex should be provided as supporting evidence.

v.   **Final Report:** Same Specifications as the Draft Final Report which is to be amended based on the feedback / comments of the Client.

All reports should be submitted to the CR-FELTP Coordinator and ITS Manager in electronic format by the stipulated deadlines.

Additional Scope Details:

Table 1: Issues Status, Category, Response Time and Resolution Time Details			
Issue Status / Errors	Category	Response time	Resolution Time
Priority 1	High - Critical / Show Stopper	0-2 hours	As promptly as possible
Priority 2	Medium - Usability / Functionality Affected	4-8 hours	Within 24 hours of initial notification
Priority 3	Low - Minor / Customisation	Within 24 hours (1 business day)	Within 5 business days of initial notification

Priority 1 Errors; High

Description: The LMS is not available or consistently fails to respond within 30 seconds from the time a properly formed request sent from CR-FELTP Coordinator or ITS Manager. There is an immediate impact on the continuity of business.

Response:

i.   Within 0-2 hours, the Consultant will acknowledge the problem report, and notify CARPHA that the problem has been reported.

ii.   Within 0-2 hours, the Consultant will assign staff to correct the error and communicate to CARPHA the steps that will be taken to correct the error, and

iii.   Will use best efforts to provide a solution as promptly as possible.

Priority 2 Errors; Medium
Description: Program errors that prevent some functionality or process of the LMS from working as intended and that substantially and adversely impact the overall performance or use of your LMS.

Response:

i.   Within 4-8 hours, the Consultant will acknowledge the problem report, and notify CARPHA that the problem has been reported;

ii.   Within 4-8 hours, the Consultant will assign staff to investigate the error and

iii.   Communicate to CARPHA the assessment of the error;

iv.   The Consultant will make accessible the status of priority II errors in the ticket tracking system for this project;

v.   The Consultant will use best efforts to provide a solution for any problems related to the configuration or implementation work done by the Consultant, and a solution for any other problems if available from the relevant open-source community, within 1 business day or as promptly as possible.

Priority 3 Errors; Low
Description: Program errors that prevent some functionality or process of the LMS from functioning as intended, that does not seriously affect the overall performance or use of the LMS.

Response:

i.   By the next business day, the Consultant will acknowledge the problem report, and notify CARPHA that the problem has been reported;

ii.   Within five business days, the Consultant will assign staff to investigate the error and communicate to CARPHA the assessment of the error;

iii.   The Consultant will make accessible the status of priority III errors in the ticket-tracking system for this project;

iv.   The Consultant will use reasonable efforts to provide a solution for any problems related to the configuration or implementation work done by the Consultant, and a solution for any other problems if available within 5 business days

Definitions:

i.   Response Time: the time by which the support team responsible for the resource or service acknowledges their assignment and contacts CARPHA to assess the situation.

ii.   Resolve Time: the time that the support team(s) will be expected on average to solve the work order for the customer. The team coordinator and technicians of the support team will monitor calls based on priority level, and work as a team to resolve the work in the expected resolve time. If it is not resolved in the expected time, it will be escalated to the Manager for further resource allocation or other action.

iii.   Resource: a server, service, device, or application

(i)   Down: completely non-functioning

Confidentiality, Copyright and other Proprietary Rights:
i.   The Consultant shall maintain full confidentiality of all documentation shared and produced during the consultancy. The Consultant may not utilize, without prior approval from CARPHA, the information for any purposes external to CARPHA.

4. **Qualification Requirements for the Key Expert**
The work requires use of initiative and capacity to work without close supervision, use of judgement, tact, and diplomacy. There is also the need to think and act quickly for immediate resolution of problems and situations.

Academic Qualifications:
i.   Bachelor's degree in Information Technology or equivalent field and / or relevant experience

Specific Experience:
i.   Prior experience managing an LMS with multi-language versions/content desired.
ii.   Experience using Moodle required.

General Experience:
   i.   Minimum of 5-10 years of experience working with Moodle Learning Management Systems (LMS) (uploading, testing, and supporting content in multiple formats) or equivalent combination of education and experience.

Languages:
   i.   Excellent knowledge of English – written and spoken

IT Skills:
   i.   Broad knowledge of Moodle LMS industry language, standards, and ability to communicate with CARPHA ITS and vendors regarding interfaces, system requirements and problem solving.

Other requirements:
   i.   Excellent written and interpersonal communication with meticulous attention to detail.
   ii. Excellent organizational, project management, multi-tasking and problem-solving skills

5. *Reporting Requirements and Time Schedule for Deliverables*

This consultancy is expected to commence in September 2021 for a period of 9 months. Reports will be submitted in electronic format to the CR-FELTP Coordinator and ITS Manager, who will be jointly responsible for approving all reports.

Table 2: Reports required and Timeline for Delivery		
Name of Report	**Content**	**Time of Submission**
Inception Report	• Detailed workplan with timelines for completing the consultancy with key milestones and expected deliverables clearly identified	No later than 2 weeks from the start date of the contract
Initial Summary Report	• Detailed report summarizing the findings of the review of the current LMS, initial findings, issues, challenges, the proposal with the course of action to address issues and challenges. • An annex should be provided as supporting evidence	No later than 4 weeks from the start date of the Consultancy
Quarterly Reports (3 Reports per Contract Year 2021)	• Detailed report highlighting activities relating to maintenance, troubleshooting and administration of the existing LMS throughout the Consultancy. • Additionally, information pertaining to the new releases and updates of the LMS is to be summarized along with supporting evidence of the activities. • Recommendations for updates/upgrades to current LMS technologies. • Updates on the release management process and recommendation for implementation.	No later than 7 days after every quarter of the contract year

Table 2: Reports required and Timeline for Delivery		
Name of Report	**Content**	**Time of Submission**
	• Detail documentation of errors resolved and recommendations for mitigation • Information related to the test instance – updates, errors encountered and solution • Utilization status of the LMS server • An annex should be provided as supporting evidence	
Draft Final Report	• Should contain descriptions of the progress made with implementation of the tasks set out in Section 3 above with a summary of findings, issues and challenges experienced and recommendations and resolutions. • An annex should be provided as supporting evidence	No later than 1 month before the end of the implementation period of the contract
Final Report	• Same specifications as the Draft Final Report • Detailed report on all activities and undertakings of the Consultancy and a summary of outputs/outcomes and feedback. • An annex should be provided as supporting evidence	No later than 14 days before the end date of the Consultancy

Table 3. Activities, Reporting and Invoice Schedule			
Quarter	**Activities**	**Reports**	**Invoice**
Q1	i. Review the current LMS, initial findings, issues, and proposed actions. ii. Create and Manage a Test instance of the application iii. Provide troubleshooting assistance for users regarding logging in to the LMS and accessing courses. (Monthly Helpdesk Report) iv. Troubleshoot and diagnose problems as reported by the LMS project lead (Monthly Helpdesk Report)	i. Inception Report ii. Initial Summary Report iii. Monthly Reports	Q1 invoice due 3 months from the start of the contract
Q2	i. Implement new version Moodle 3.11 ii. Minor release(s) iii. Moodle Plugins Service Soft Launch	Monthly Reports	Q2 invoice due 6 months from the start of the contract

Table 3. Activities, Reporting and Invoice Schedule			
Quarter	Activities	Reports	Invoice
	iv. Provide troubleshooting assistance for users regarding logging in to the LMS and accessing courses. (Monthly Helpdesk Report) v. Troubleshoot and diagnose problems as reported by the LMS project lead (Monthly Helpdesk Report)		
Q3	i. Minor release(s) ii. Provide troubleshooting assistance for users regarding logging in to the LMS and accessing courses. (Monthly Helpdesk Report) iii. Troubleshoot and diagnose problems as reported by the LMS project lead (Monthly Helpdesk Report)	Monthly Reports Draft Final Report Final Report	Q3 invoice due 9 months from the start of the contract

6. **Client's Input and Counterpart Personnel**

i. Services, facilities and property to be made available to the Consultant by the Client include:

   a. Access to application on the server (remote)
   b. No office accommodation will be provided by the Client.
   c. The Consultant shall be required to provide his/her personal computer (e.g. laptop or tablet) and Internet connectivity for use during this project

ii. Professional and support counterpart personnel to be assigned by the Client to the Consultant's team: None