

## **16.25.NC.P.T5**

### **Statement of Work for Learning Management System for the College of Charleston**

#### **BACKGROUND**

The College of Charleston is a public liberal arts and sciences university located in the heart of downtown Charleston, South Carolina. Founded in 1770, the College is among the nation's top universities for quality education, student life and affordability. The College offers a distinctive combination of a beautiful and historic campus, modern facilities and cutting-edge programs.

Students from all 50 states and 75 countries choose the College of Charleston for its small-college feel blended with the advantages and diversity of an urban, mid-sized university. The campus population consists of approximately 10,000 undergraduate students, 1,500 graduate students, 548 full time faculty members plus 367 part time faculty, and 897 full time staff members plus 198 part time and 117 FT temporary staff.

More information about the College can be found at [www.cofc.edu/about](http://www.cofc.edu/about).

#### **INTRODUCTION**

The College desires to engage a vendor who will provide an administrative and end-user friendly, cloud hosted Learning Management System (HR LMS) for Faculty and Staff. The College employs approximately 2200 faculty and staff who would be eligible to use the system; however, we do not know how many employees would log-in during any given month. We would estimate that the number would be less than 300; however, there may be instances of compliance training where closer to the 2200 would be required to complete a course. The system will be used to house learning content, register for trainings, issue event reminders, track individual professional development, assess or quiz learning, and report on individual and group completion of learning.

The general scope of the requirements is as detailed below in this document.

All proposals must be complete and carefully worded and must convey all of the information requested in order to be considered responsive. If the proposal fails to conform to these essential requirements, the College and the College alone will be the judge as to whether that variance is significant enough to consider the offeror to be non-responsive and therefore not considered for award.

Contract Period:

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It is intended that this contract shall be for a period of one (1) year with options to extend for a further four (4) years.

- The contract period shall be five years beginning approximately on April 18, 2016, and unless earlier terminated or extended, ending on April 17, 2021.
- A resulting contract will automatically extend on each year's anniversary date unless either party elects not to extend the contract. If the Contractor elects not to extend on the anniversary date, the Contractor must notify the College of its intention in writing ninety (90) days prior to the anniversary date.

The College of Charleston may terminate this contract providing a thirty (30) day notice in writing is given to the Contractor. In the event this contract is terminated or canceled upon request and for the convenience of the State without the required thirty (30) days advance written notice, then the State may negotiate reasonable termination costs, if applicable.

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### **Cover Letter:**

Offerors must provide a cover letter that includes a summary of the offeror's ability to provide the product and service described herein together with a description of the offeror's background and experience.

Provide a statement that the offeror is willing to enter into a contract with College of Charleston. The cover letter must be signed by a person having the authority to commit the offeror to a contract.

Describe how your company understands the requirements of the project, has prior relevant experience that attests to your ability to develop the components of the requirements and meets or exceeds each of the features and requirements listed. Proposals should be prepared simply and economically, providing a straightforward, concise description of offeror's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content. The College, at its sole discretion, may require a presentation of the offerors proposals. It is critical that proposals contain detailed and complete responses. Do not rely on providing a response as part of a demonstration.

Provide details from not less than THREE (3) other organizations/institutions (preferred colleges but at least one college if possible) where you have provided similar product and services of similar size and scope. Include names, addresses and telephone numbers of administrators who are in the position to evaluate the general quality of your product.

List any contracts terminated for cause or convenience prior to the expiration date of the contract.

It is a condition of this solicitation that both attachments (IT Technical and Security Specifications) are completed and returned as PDF documents when submitting a bid.

Proposals which include either modifications to any of the contractual requirements of the RFP or an offeror's standard terms and conditions may be deemed non-responsive and therefore not considered for award.

## **SCOPE OF WORK / SPECIFICATIONS**

### **ESSENTIAL**

It is critical that select departments are able to manage their own courses and information, but that a central administrator in Human Resources will have access to all information.

Also essential is that the LMS can authenticate the learner through Central Authentication Service (CAS) or Active Directory Federation Services (ADFS), or single sign-on through **Ellucian** Self-Service Banner.

In addition, it is essential that there is a seamless reporting method included for tracking course completion.

It is estimated that approximately 9 College employees will administer and manage some course content in the HR LMS and training should be available for these content providers/administrators.

It is also important that the system is SCORM compliant.

### **PREFERRED**

Ideally, the HR LMS would seamlessly interface with Ellucian Banner to automatically activate and deactivate users (or at least provide an administrator friendly method to update user information – preferably through an upload process with the availability of manual updates).

It is preferred that course development software is included.

It is also preferred that HR Compliance modules are included.

It would be ideal to have minimal Information Technology involvement both in implementation and administration.

We would prefer an implementation process and administrative process that is not labor intensive.

### **Definitions**

For clarification of roles in this document:

- a. Administrator: the central administrator for the system
- b. Content Providers: employees throughout the campus who will be developing and providing courseware and will require privileges to access their content and track their learners
- c. Supervisors: employees who manage other employees
- d. Learners or Users: all employees

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**Detailed Response:** Please provide a description for each item, rather than simply an affirmative/negative response.

### 1.0 Business Partnerships

- 1.1 List at least 310 organizations/institutions (preferred colleges but at least one college if possible) with addresses, HR and IT contacts and phone numbers that use the proposed solution. We would like to contact them for detailed reference checks. Please also indicate if any of schools use Ellucian Banner and integrate with your solution.
- 1.2 Describe a typical system issue and how we would contact you and what response and response time would be expected.
- 1.3 Describe a complex system issue and how we would contact you and what response time would be expected.
- 1.4 What type of events or user groups are available to Administrator and Content Providers?
- 1.5 What “help” information is supplied to users? Administrators?
- 1.6 What hours is your “help desk” open for administrators? What hours is it open to users?
- 1.7 What training is provided for content providers, administrators?
- 1.8 Describe your training documentation for administrators, content providers and users.

### 2.0 Security

- 2.1 Describe your security philosophy and protocols to ensure data is secure.
- 2.2 What are the authentication method(s) that you support?
- 2.3 Explain e-signatures availability and process (for compliance training purposes).

### 3.0 System Reliability

- 3.1 What is your system percentage of “uptime”?
- 3.2 Provide a 2 year history of unscheduled outages.
- 3.3 What is your process for communicating outages?
- 3.4 How are routine updates installed?
- 3.5 What is the longest length of “downtime” for updates over the last 2 years?
- 3.6 Provide a 2 year history of upgrades.

**4.0 Back-Up and Disaster Recovery**

- 4.1 Describe your system back-up.
- 4.2 Describe your disaster recovery process.
- 4.3 Describe how we would receive our data in the event that you went out of business or we decided to utilize another HR LMS. Tell us your process and in what format the data would be given.

Offerors should state how access to data will be made available to the College on termination of the contract and in what format the data will be. The offeror should state what, if any, fees would arise in providing “reader” software after the termination of the contract. The contractor will assist in any transition of data to a subsequent contractor in a solicitation.

**5.0 Browser and Mobile**

- 5.1 What browsers (and versions) do you support?
- 5.2 Describe the mobile learning availability and on what devices it runs.
- 5.3 Compare and contrast the mobile learning with the full LMS?
- 5.4 What if any additional costs are there for a mobile learning app? This cost, if any, should be outlined in your proposal but will not form part of the cost evaluation.

**6.0 Accessibility and Language**

- 6.1 Explain accessibility of system and support materials.
- 6.2 Describe the level and standards of accessibility.
- 6.3 Explain supported languages and what steps must be taken by whom to make them available to user.

**7.0 SCORM, AICC, IMS Common Cartridge, Tin Can**

- 7.1 Discuss which of the above you support, how, and at what level and tracking capabilities.
- 7.2 What API’s are available?

## **8.0 Implementation**

- 8.1 Explain the implementation process. Provide a high level plan to illustrate.
- 8.2 Who do you recommend is involved in the implementation process?
- 8.3 How many hours are required for implementation? Parse the hours by role.
- 8.4 How do we customize branding? Who can customize? Explain the process and time involvement. What are the extra costs? This cost, if any, should be outlined in your proposal but will not form part of the cost evaluation.
- 8.5 Is there any other information we should know about implementation? Batch uploads, data required, etc?
- 8.6 Explain the sandbox and training site provided.

## **9.0 Administration**

- 9.1 Define the role of the administrator and the recommended FTE for our size institution.
- 9.2 Define the available roles (i.e. learner, supervisor, content provider, groups, etc.) as your product assigns them. Give examples of permissions that they would have or could be assigned.
- 9.3 Describe the management of change of supervisor, adding users to a supervisor, and changing the roles/permissions of the supervisor.
- 9.4 What is the process for retaining information once a user has been de-provisioned?
- 9.5 Explain in depth any integration **you** provide with Ellucian Banner relative to provisioning and changes.
- 9.6 Describe any integration with PeopleAdmin.

## **10.0 Learning Content Modules**

- 10.1 What learning modules are provided? What are the other available modules? What is the pricing for available modules.
- 10.2 What other learning providers do you support (i.e. SkillSoft, Element K, New Horizons, etc.)? Explain how their content would be added.

**11.0 Space Management**

- 11.1 What type of files can be uploaded? How are multiple or zipped files uploaded?
- 11.2 What is the size limit of files that can be uploaded?
- 11.3 Describe your tools for space management.
- 11.4 Explain any space limitations for College of Charleston added content. What are costs for additional space? This cost, if any, should be outlined in your proposal but will not form part of the cost evaluation.

**12.0 Course Assignments and Tracking**

- 12.1 Describe how courses are assigned to users and who can assign them (by supervisor, content managers, administrators (i.e. onboarding tasks).
- 12.2 What method is there to bulk assign a group of employees to specific courses (i.e. all new employees to onboarding courses or all employees to Sexual Harassment refresher)?
- 12.3 Explain how user progress in a course is tracked (from user, supervisor and administrative perspective).
- 12.4 Describe the method to track completion of courses that are outside the LMS (YouTube or video from another provider)?
- 12.5 Describe the method(s) used to prevent the user from video fast forward.
- 12.6 How can an end-user and/or supervisor add other accomplishments, certifications achieved outside of the HR LMS?
- 12.7 How does your system handle pre-requisites with respect to eligibility to “take” a course?
- 12.8 How can learning paths (groupings) be developed to create curriculum plans?

**13.0 Content Providers**

- 13.1 Explain how multiple content providers enter courses and track completion
- 13.2 What types of format may be uploaded (i.e. PowerPoint, Adobe Presenter, Flash, etc.)



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### **14.0 End User Experience**

- 14.1 Describe how the end-user can customize their experience.
- 14.2 How does an end-user self-enroll?
- 14.3 Describe the communication and collaboration tools (i.e. whiteboard, chat, group work, discussion board, etc.)

### **15.0 Registration for Classroom or Virtual Workshops**

- 15.1 How are announcements for workshops, classes, requirements sent? Who can send announcements?
- 15.2 How does your solution interface with calendars (include Outlook, Safari, Google, and any others).
- 15.3 How are reminders, confirmations, cancellations handled?
- 15.4 How can the number of learners be limited to control class size?
- 15.5 How is a wait list for enrollment handled?
- 15.6 How is classroom or virtual workshop completion tracked?

### **16.0 Assessments**

- 16.1 Explain the assessment tool/template? How does the content provider add an assessment?
- 16.2 What type of assessment questions are available (i.e. true/false, multiple choice)
- 16.3 How can other supplemental assessment documents be added by the user and scores/grades added (i.e., a document or written paper)?
- 16.4 What type of time tracking is available for assessments?
- 16.5 What type of gamification does your solution provide?
- 16.6 Can assessment question answers be compiled and analyzed (i.e. to look at how many people are missing the same questions)? If so, how?

**17.0 Reporting**

- 17.1 Provide a sample report for each of the following: by employee, by supervisor, by course, by institution. Explain how the report was built. Do any reports incur extra cost? This cost, if any, should be outlined in your proposal but will not form part of the cost evaluation.
- 17.2 Explain how reports can be scheduled. What type of users can run the reports?
- 17.3 Explain how events, courses, workshops outside the LMS can be included in the reports?
- 17.4 Is reporting real-time? If not, explain the time lag.
- 17.5 What formats can reports be exported to (i.e. Excel? Word?)
- 17.6 What type of charts, graphs, and statistics are provided to the user, supervisor, course providers and administrator?
- 17.7 Discuss the method of certification of coursework (i.e. after completing a certain number of prescribed courses).

**18.0 Active Users**

- 18.1 If you price by "Active User" define "Active Users".
- 18.2 Explain process for going over tier level of set Active Users.
- 18.3 Explain process for changing tier plan.

Monthly log-ins may vary greatly depending upon the need for mandatory training sessions and would typically be much lower than the maximum 2200 employees

**19.0 Unique Features**

- 19.1 Please list 5 unique features that you believe your product offers that would be advantageous for the College of Charleston.

**20.0 Additional Costs**

- 20.1 What additional costs (other than in RFP Response) might be incurred in implementation, enhancements, etc.? These costs, if any, should be outlined in your proposal but will not form part of the cost evaluation.

**PROPOSAL CONTENTS**

To be considered for award, all proposals must include, as a minimum, the following information. **All information should be presented in the listed order:**

**A. Cover Letter:**

Provide a cover letter that includes a summary of the offeror's ability to perform the services described herein and statement that the offeror is willing to perform these services and enter into a contract with the College of Charleston. The cover letter must be signed by a person having the authority to commit the offeror to a contract.

**B. Management Approach and Expected Ability to Fulfill:**

Please include a description of the offeror's capacity to provide the services desired and the resources required to efficiently deliver on a project of this size and scope.

**C. Financial Consideration**

Complete Cost Proposal for this Contract.\*

**D. Proven Performance and Customer Service**

1. Provide a description of the offeror's background, experience and firm's stability.
2. Provide references from not less than three(3) other colleges or universities similar in size and demographics where you have provided similar services. Include names, addresses and telephone numbers of administrators who are in the position to evaluate the general quality of your performance.
3. List any contracts terminated for cause or convenience prior to the expiration date of the contract.

Monthly log-ins may vary greatly depending upon the need for mandatory training sessions and would typically be much lower than the maximum 2300 employees.

All proposals will initially be reviewed to determine responsiveness. Any proposal that does not meet the material and/or essential requirements of the College will be subject to disqualification pursuant to S.C. Statute, Regulations and Interpretative Authorities. Offers will be evaluated using only the factors stated below. Evaluation factors are stated in the relative order of importance, with the first factor being the most important. Once evaluations are complete, all responsive Offerors will be ranked from most advantageous to least advantageous.

**AWARD CRITERIA**

Proposal will be evaluated by a review panel on the basis of the following criteria listed in order of importance:

1. ***Management Approach and Expected Ability to Fulfill.***
2. ***Financial Consideration.***
3. ***Proven Performance and Customer Service.***

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### AWARD

An award resulting from this solicitation shall be awarded to the responsive and responsible offeror whose proposal is determined to be most advantageous to the College.

Monthly log-ins may vary greatly depending upon the need for mandatory training sessions and would typically be much lower than the maximum 2200 employees.

Offerors are required to construct their bids based on the following estimated number of log-ins per month:

0-100	\$ _____	
101-300	\$ _____	
301-500	\$ _____	
501-700	\$ _____	
701-900	\$ _____	
>901	\$ _____	
* Year one installation, training etc.	\$ _____	
Cumulative total for year one		\$ _____
0-100	\$ _____	
101-300	\$ _____	
301-500	\$ _____	
501-700	\$ _____	
701-900	\$ _____	
>901	\$ _____	
**Cumulative total for years 2-5		\$ _____

\* Offerors must provide a **total FIXED cost** for the provision of the service, inclusive of installation charges, training etc and **must** be inclusive of travel costs and mileage.

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**\*\*For the avoidance of doubt, the figures for years 2-5 must show costs for each level for the complete four years. That is, assume no increase in charges over the term.**

The cost proposal will be evaluated based on the weighted average cost of each layer of log-ins for the five years, 0-100 receiving the highest multiplier, >901 receiving the lowest multiplier together with year one costs for training, installation etc..

**Monthly payments will be made based on actual log-in levels in the preceding calendar month at the rates quoted in your proposal.**

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OFFEROR: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, \_\_\_\_\_

STATE, \_\_\_\_\_

ZIP CODE: \_\_\_\_\_ TELEPHONE NUMBER: \_\_\_\_\_

FEDERAL EMPLOYER IDENTIFICATION NUMBER: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

**Signed:** \_\_\_\_\_